Small Business Management Toolbox

Trainer’s Guide

August 2003

Holmesglen Institute of TAFE
Acknowledgments

The Small Business Management Toolbox was funded by ANTA and developed by Holmesglen Training and Development, Holmesglen Institute of TAFE.

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We would like to thank all advisors, writers, technical editors and reviewers who contributed to the development of this project. In particular we would like to acknowledge the following key groups for their contributions to this project.

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All information in this resource was current within the year of publication, but may subsequently change. ANTA and Holmesglen Training and Development accept no responsibility for subsequent changes or inaccurate information.
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Introduction

Welcome to the Trainer’s Guide for the Small Business Management Toolbox. This guide has been designed to help you construct a learning program using the components of the Toolbox.

The Small Business Management Toolbox is specifically designed to assist people working in or planning to work in small businesses to acquire knowledge that is critical to business development and sustainability. It is designed to provide small business owners and managers with a range of skills and competencies to enable them to establish and grow their small business ventures.

What is a Toolbox?

A Toolbox is a collection of online training materials comprising learning activities, resources and user guides to support program delivery for endorsed Training Package qualifications.

The resources in the Toolbox are based on eleven competency standards from the Business Services Training Package BSB01.

• BSBCM402A Develop work priorities
• BSBCM410A Coordinate implementetion of customer service strategies
• BSBCM411A Monitor a safe workplace
• BSBSBM301A Research business opportunities
• BSBSBM401A Establish business and legal requirements
• BSBSBM402A Undertake financial planning
• BSBSBM403A Promote the business
• BSBSBM404A Undertake business planning
• BSBSBM405A Monitor and manage business operations
• BSBSBM406A Manage finances
• BSBSBM407A Manage a small team

Details of these competency standards are available at the National Training Information Service website <http://www.ntis.gov.au>.
Technical requirements

The minimum hardware requirements for running this Toolbox are as follows.

- IBM compatible computer with a 300 MHz processor
- 64 MB of SDRAM
- 800 x 600 16-bit display (1024 x 768 recommended)
- Minimum 60 MB of hard disk free
- CD-ROM drive
- 28.8 K modem

OR

- Macintosh equivalent

Learners will need to have access to the following software to use the product.

- Internet Explorer version 5 or Netscape Navigator version 4.7 or higher
- Adobe Acrobat Reader – version 4 or higher (available from www.adobe.com)
- Macromedia Flash Player – version 5 or higher (available from www.macromedia.com)

The resources in this Toolbox have been tested to comply with W3C Web Accessibility Initiative Priority 1 standards.
The Small Business Management Toolbox

Overview

The Small Business Management Toolbox contains a range of resources designed to assist in the flexible delivery of the eleven competency standards covered. Flexible delivery may incorporate a variety of methods, including web-based learning, distance education, face to face classes or group work.

The Toolbox structure allows learners to take an active and constructive role in their own learning by exploring the Toolbox for specific items of interest or relevance.

Each of the competency standards covered by the Small Business Management Toolbox presents the learner with the following consistent set of resources.

<table>
<thead>
<tr>
<th>Your task</th>
<th>An overriding activity, requiring learners to apply knowledge and skills associated with the competency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topics</td>
<td>Individual content areas dealing with specific aspects of the competency.</td>
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<tr>
<td>Self tests</td>
<td>Short quizzes targeted at each topic that allow learners to measure their current understanding.</td>
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<td>Activities</td>
<td>Opportunities for learners to apply knowledge contained within topics and develop skills in various aspects of small business management.</td>
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<td>Example businesses</td>
<td>Hypothetical businesses that learners may wish to use for applying concepts and principles outlined in the topics, particularly if they do not run a business of their own.</td>
</tr>
<tr>
<td>References</td>
<td>Additional sources of information such as books and websites. A quick reference guide to business terms is also included.</td>
</tr>
</tbody>
</table>

Section 3 of this guide examines these features in more detail and suggests some tips for using each in a learning strategy.
Navigation

The Toolbox has been designed to ensure that navigation is as simple as possible. The following features have been included to assist movement around and between the resources.

The competencies screen is the first page that the learner sees when accessing the Toolbox (ie the ‘home page’). This screen provides access to each of the eleven competencies and a link to a page of useful tips for first time users.

Trainer’s tip

Trainers should suggest that learners access the ‘First time user’ page for valuable tips on using the Toolbox. This will also familiarise them with the layout and features of the Toolbox.
Within each competency, all similar resources (topics, activities, self tests etc) are grouped together in separate sections, which are accessible via the top navigation bar.

Use the features at the side of the top navigation bar to access the following.

- The **Learner's Guide**.
- The **Home** page (to view another competency).
- A list of **Contents** for the competency. This list of all relevant resources provides single-click access to every resource within the competency.
- A link to a **Discussion** board or chat session. You will need to arrange for this feature to be set up for your learners.

The 'breadcrumb' feature has been included immediately below the navigation bar on each screen. This assists navigation by indicating the position of the current screen within previous resource levels of the Toolbox. In the example shown, the topic 'Staff plans' has several subtopics. The subtopic of the current page is 'Job descriptions'. Each level of this breadcrumb can be clicked, providing a shortcut back to a specific preceding section of the resource.
Callout boxes on the right side of each screen indicate relationships between resources. For example, a callout box within a particular topic will direct the learner to activities or downloads pertaining to the specific content covered.

The target audience

The Toolbox is designed to be used for training in small business management around Australia. While differences in terminology and approaches may occur in legislation and so on across different states, the Toolbox tries to take a generic approach. It is hoped that trainers will use discussions (face to face or online) to give learners an understanding of local requirements where appropriate.

Small business enterprises are usually described as organisations employing fewer than 20 people. A small business may consist of a sole proprietor who is required to perform multiple roles, or a number of owners who need to operate as a team. Such businesses include property, financial and business services as well as manufacturing, trade, retail and service industries.

Learner characteristics

Learners accessing the Small Business Management Toolbox may reflect a wide range of backgrounds, experiences and needs. Some will have prior employment experience in small business, perhaps even at management level.

The majority of learners currently studying Small Business Management tend to undertake those competencies specifically relating to their immediate needs. Some learners may also be completing competencies as part of a complete qualification such as the Certificate IV in Business (Small Business Management).
The design of this Toolbox caters for both learner groups. Learners can work through an entire competency standard (perhaps using the overriding task as a guide), or simply explore specific topics or activities of personal interest.

**Learner accessibility**

The Small Business Management Toolbox has been designed to comply with accessibility standards, thus allowing learners with physical or learning disabilities or special literacy needs to use the online resources. For example:

- literacy needs for second language learners or those with low literacy levels have been catered for by using Plain English guidelines
- layout and fonts have taken into account the needs of screen-readers for the blind and visually impaired
- visual images including Flash devices used for presentation of text, quizzes and interactive activities have alternative text provided describing and/or reproducing what they include.

**NOTE:** The Toolbox has been designed for learners studying competencies at Certificate IV level. These competencies require a certain level of language literacy appropriate to subject-specific vocabulary.

**Enlarging the text**

The Toolbox has been designed so that the size of text can be enlarged (or reduced) to assist readability. The process for doing this varies for different browsers.

**Windows users**

In **Internet Explorer**, use View…Text size or, if you have a mouse with a scroll wheel, hold CTRL and scroll the mouse wheel up or down.

In **Netscape**, use CTRL [ or ].

**Macintosh users**

In **Internet Explorer**, use View…Text zoom or COMMAND + or -.

In **Netscape**, use COMMAND + or -.
How do I put together a learning program?

Your role as trainer is the key to providing adequate learning support. The learning activities together with this guide will give you ideas about how to encourage and support learners during the learning process.

Teaching strategies should be selected to reflect the varying learning needs, educational backgrounds and preferred learning styles of the individual learner and the specific requirements of each element of the competencies being studied.

It is expected that trainers will want to select the learning objects most relevant to their learners’ needs and their own teaching styles. Trainers may wish to:

- determine the order of presentation
- substitute or add their own materials
- provide additional case studies and/or example business scenarios.

The Toolbox materials are not intended to:

- restrict training providers to using the materials in their entirety
- replace the role of the trainer in the learning process
- stipulate assessment approaches.
Using the Toolbox components

The structure of resources within this Toolbox is consistent across each of the 11 competency standards.

This section describes each of these components and highlights some potential teaching strategies that you may like to adopt.

Your task

Upon accessing a competency standard, learners are initially presented with an overarching task requiring the learner to apply the knowledge and skills associated with the competency standard to a small business. Learners may choose to apply the task to their own business, another that they can access or one of the 'Example businesses' provided within the Toolbox (see below for more information).

Each task has been designed to produce a submittable result such as a safety report, business plan or marketing strategy. Learners are given a broad overview of the required result and provided with tips for using the Toolbox to complete the task.

Tasks provide two different approaches for using this online resource.

- Adopt a **problem-based** approach to learning, using the task as an impetus for accessing resources of personal relevance.
- Adopt a **content-based** approach to learning, using the task as a demonstration of knowledge gained from the resources.

Trainers should provide learners with guidelines for preparing and submitting tasks relevant to the competency standards studied.

**Trainer’s tip**

Tasks could form part of the assessment strategy for a competency standard.

You may even like to alter the structure of a task in order to assess specific performance criteria.
Topics

The content of each competency standard is provided within several topics, which address a particular aspect of the work involved.

This structure allows for easier navigation throughout the resource, providing quick access to particular areas of relevance or interest and allowing trainers to direct learners to specific information.

Topics also emphasize particular points of relevance through the use of two additional features.

- **Case studies** demonstrate the practical applications or implications of theories and concepts presented in topics.
- **Mentors** provide additional information to learners about particular aspects of a topic. A particular character is used as the mentor in each competency standard, in order to provide an appropriately personable voice. For example, the mentor in 'Monitor a safe workplace' is a 'Safety Rep', while the mentor in 'Undertake business planning' is a 'Business Advisor'.

**Trainer's tip**

The 'learning object' structure of the Toolbox allows individual topics to be duplicated, removed or edited in order to tailor delivery.

For more information or assistance, contact the Toolbox helpdesk on (02) 6230 5349 or at Toolboxhelp@flexiblelearning.net.au.

Self tests

Each competency includes several self tests (or quizzes) that allow learners to test their knowledge of a particular subject area at any stage while working through the Toolbox resources.

Each self test addresses the content contained within a specific topic, providing learners with an opportunity to identify specific gaps in their knowledge and subsequently use the Toolbox in the most efficient manner.

It should be emphasized that a self test is not a comprehensive examination of a learner's knowledge of a topic. Rather, it is there to highlight gaps in their knowledge so that they can focus their learning on these areas.
Activities

The activities in each competency allow learners to apply knowledge contained within topics and develop skills in various aspects of small business management.

There are several categories of activities available in the Toolbox.

- **Interactive activities** use a variety of multimedia techniques to provide an engaging learning experience for the learner.

  In accordance with web-based learning accessibility requirements, text-based alternatives have been provided for all interactive activities.

- **Practical activities** require learners to apply concepts and processes covered in the topics to practical situations within the workplace – either an actual business or one of the ‘Example businesses’ provided in this Toolbox.

- **Research activities** require learners to use the Internet and other sources of information to explore a specific content area in more detail.

  Some research activities require learners to prepare some form of submittable document, such as a checklist or report. Learners should be provided with information about submitting the results for such activities (email, post, etc).

- **Discussion starters** prompt learners to reflect on particular aspects of the content and then share their thoughts with other learners.

**Trainer’s tip**

Trainers will need to specify appropriate methods for learner discussions.

Depending on methods of delivery and resources available, this may involve a classroom activity, participation in an online discussion board or chat session, email communication between learners or group work.

Trainers may wish to use some of the practical activities and research activities as part of their overall assessment approach, either as they are presented or in some kind of modified format.

Activities can be accessed from the related theory in the Topics screens. Alternatively, all activities for a competency are listed in the Activities screen for that competency.
Example businesses

A key factor of the Toolbox design is the inclusion of various example businesses that learners may wish to use for applying concepts and principles outlined in the topics. The main purpose of this feature is to provide situations for the application of tasks or activities to learners who do not have access to an actual business.

Each of these hypothetical examples provides information about the structure of the business, the staff, the nature of work undertaken and other details where required. Specific features of businesses may vary depending on the information required within each competency standard.

**Trainer's tip**

You may like to provide substitute or additional businesses where appropriate. This could be particularly appropriate for trainers using pre-established case studies in their delivery.

For more information or assistance, contact the Toolbox helpdesk on (02) 6230 5349 or at Toolboxhelp@flexiblelearning.net.au.

References

Each competency standard contains a list of references that learners may find useful for completing specific activities or researching topics of interest. These may include books, journals, websites and other sources of further information.

There is also a quick reference guide to business terms. This is a download document that can be viewed on the screen or printed out. The quick reference guide is the same for all competencies.

**Trainer's tip**

You may like to edit the references list for particular competency standards in order to provide learners with particular items of relevance or interest.

For more information or assistance, contact the Toolbox helpdesk on (02) 6230 5349 or at Toolboxhelp@flexiblelearning.net.au.
Assessment strategies

Within each competency, ‘Your task’ and a selection of the research and practical activities could form part of an overall assessment strategy. As a trainer, you may choose to adapt, supplement or modify these tasks and activities to fit your overall approach.

Details of the competencies

Coordinate implementation of customer service strategies

The materials in this competency aim to give learners the skills and knowledge needed to advise on and carry out customer service strategies, evaluate customer service strategies on the basis of feedback and design strategies for improvement.

The task for this competency is to prepare a customer service charter for a business, policies and procedures for customer service and a questionnaire to survey customer’s needs and wants in relation to products or services for a specific business. This business may be a workplace with which the learner is familiar such as their own business, or one of the ‘Example businesses’ provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Communicating with your customers
- Customer service strategies
- Research skills
- Making changes
Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Listening

Learners practise their listening skills by choosing appropriate responses to clarify what has been said.

Dealing with complaints

Learners choose appropriate responses to a customer's complaint. Multiple pathways through this activity are possible.

Downloads

The following downloads are available in this competency.

In the topic 'Communicating with your customers'

- **Communication tips** – A list of suggestions to promote good communication with customers.
- **Tips for assertive communication** – How to be assertive in communication with customers, including words and phrases to assist in this process.
- **Dealing with complaints** – Things to do (and not do) when dealing with complaints from customers.

In the topic 'Customer service strategies'

- **Refund policy** – A sample policy and procedure for refunds to customers.
- **Customer service charter** – A sample charter for interaction with customers for a professional services business.

In the topic 'Research skills'

- **Tips for writing questions** – Helpful suggestions for writing survey questions.
- **Customer satisfaction survey** – A sample customer satisfaction survey. Sample results for this survey are analysed in the download 'Sample survey results' (see below).
- **Customer satisfaction survey results** – Shows some different ways to display results of a survey. Results are displayed for the sample customer satisfaction survey from the download 'Customer satisfaction survey'.

In the activity 'Improving a survey'

- **Sample survey** – A poorly constructed survey for learners to improve.
Critique of sample survey – A critique of the sample survey that learners have been asked to improve.

In the activity 'Customer service standards'

Customer service standards – A table to fill in to help develop customer service standards for a business.

In the activity 'Customer service benchmarks'

Customer service benchmarks – A table to fill in to help determine four levels of customer service for a business.
Relevance to other competencies

Useful additional material for this competency is found in the following competencies.

- Establish business and legal requirements (Regulations)
- Manage a small team (Staff management)
- Monitor and manage business operations (Quality assurance, as well as Systems and benchmarking)
- Promote the business (Market analysis and research, as well as Marketing planning)

Some of the material in this competency is also relevant as useful additional material for the competency 'Undertake business planning'.

Develop work priorities

The materials in this competency aim to give learners the skills and knowledge required to plan their own work schedules and to monitor and obtain feedback on their own work performance and development.

The task for this competency is to prepare a workgroup plan, a set of work objectives, a plan for monitoring performance and an analysis of professional development needs for an employee. These may be developed for a workplace with which the learner is familiar such as their own business, or one of the 'Example businesses' provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Planning your own work schedule
- Monitor your own work performance
- Coordinate professional development

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Priorities in a small business

Learners make decisions about the most appropriate way to deal with demands from more than one customer at a time in a retail situation. Multiple pathways through this activity are possible.
Resources to be considered

Learners are asked to plan ahead and consider the resources that will be needed to complete various work objectives.

Planning a work schedule

In the first part of this activity, learners are asked to prioritise tasks to be completed as part of a busy work schedule. In the second part of the activity, learners work out 'deadlines' for each step of a multi-stage process.

Determining development needs

Learners 'interview' three staff working in a packaging company to find out specific training needs of each. They are then asked to suggest appropriate training courses.

Downloads

The following downloads are available in this competency.

In the topic 'Monitor your own work performance'

- Employee assessment checklist – A sample of essential and desirable criteria for employees and how these can be used to assess employees.
- Sample customer satisfaction survey – An example of a brief customer satisfaction survey used by a car service centre.
- Carcass defect recording sheet – An example of a quality checklist used in an abattoir.

In the activity 'Improving a survey'

- Sample survey – A poorly constructed survey for learners to improve.
- Critique of sample survey – A critique of the sample survey that learners have been asked to improve.
Establish business and legal requirements

The materials in this competency aim to enable learners to identify and comply with legal and administrative requirements applicable when setting up or running existing micro and small businesses.

The task for this competency is to choose an appropriate business structure for their chosen business, identify appropriate licences and laws that apply and outline systems to be used to ensure compliance with these. This includes preparation of a record keeping system to support compliance. The business to which this is to be applied may be a workplace with which the learner is familiar such as their own business, or one of the 'Example businesses' provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.
- Structures, names, licences and permits
- Legislation
- Employment
- Business environment
- Record keeping

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Business structure

Learners are asked to choose the most appropriate business structure for various businesses.

Business requirements

Learners are asked questions about the business and legal requirements for three different small businesses.

Downloads

There are no downloads in this competency.
Relevance to other competencies

Useful additional material for this competency is found in the competency 'Monitor a safe workplace'.

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Manage a small team
- Manage finances
- Undertake business planning

Manage a small team

The materials in this competency cover planning and managing staff. They involve industrial relations, staff selection, staff records, induction, training and team development to enhance business operations.

The task for this competency is to develop a staff plan for a business, including job descriptions, an organisational structure, a training plan for each staff member, an agenda for regular staff meetings and a policy and procedure manual for aspects of the business relating to staff management. The business may be a workplace with which the learner is familiar such as their own business, or one of the 'Example businesses' provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Staff plans
- Forming your team
- Industrial relations
- Management styles
- Staff management
Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Staffing mix

Learners choose the most appropriate people for the tasks required in a particular business.

Person specifications

Learners choose the most appropriate wording for a person specification for a particular job.

Newspaper advertisements

Learners compose various job advertisements by choosing the most appropriate wording.

Open and closed questions

Learners look at different ways of asking questions in a job interview situation to see the differences in the types of responses they evoke.

Who would you shortlist?

Learners are given a position description for a job being advertised and excerpts from five job applications for the position. They are asked to select two people to be shortlisted for interviewing.

Handling difficult situations

Learners are asked to choose the most appropriate response in two situations where employees have approached their manager with a problem.

Choosing an appropriate management style

Learners are asked to make decisions about the best way to deal with situations where problems with employees have been brought to the attention of the manager. Multiple pathways through this activity are possible.

Leadership styles

Learners are asked how they would respond to various workplace situations. They are then given feedback about the type of leadership style this response suggests.
Downloads

The following downloads are available in this competency.

In the activity 'Design advertisements' and in the topic 'Staff plans'

- **Sample job description** – An example of a job description to show the types of things that should be included.

In the topic 'Staff plans'

- **Person specification** – An example of a person specification to show the types of things that should be included.

In the topic 'Forming your team'

- **Sample job application form** – An example of a job application form that might be useful for employers recruiting new staff.
- **Questions to ask in a job interview** – Some ideas for questions to ask a job applicant in an interview situation, with an explanation of how each question can help determine the suitability of each candidate.
- **Example employee leave form** – An example of forms that can be useful for recording details of employees' leave entitlements and leave taken.

In the topic 'Staff management'

- **Training tips** – Some ideas for effective training when demonstrating and explaining jobs, skills or techniques to employees.
- **Sample policy and procedure manual** – Sample policies and procedures for induction, termination of employment and training and professional development.
- **Contingency planning checklist** – A list of situations for which a business should have contingency plans in place.
- **Procedures for terminating employment** – A set of procedures to be followed in different situations where dismissal of an employee is necessary.

Relevance to other competencies

Useful additional material for this competency is found in the following competencies.

- Establish business and legal requirements (Record keeping)
- Monitor a safe workplace
- Monitor and manage business operations (Management systems)
- Undertake business planning (The staffing section)
Manage finances

The materials in this competency aim to give learners the skills they need to implement, monitor and review strategies for the ongoing management of finance in a small business. It also includes day to day financial management of the business.

Bookkeeping as such is not taught in detail in this competency but is referred to. For this course, learners need enough knowledge to be able to talk to and meet the needs of bookkeepers and accountants. Any learner interested in finding out more than this should consider taking a course dealing specifically with bookkeeping.

The task for this competency is to prepare documents to illustrate an ability to manage finances, including journals for daily record keeping, a plan for a filing system, a taxation plan, debtor policy and an outline of how key performance indicators will be monitored in a budget. The business for which these are prepared may be a workplace with which the learner is familiar such as their own business, or one of the example businesses provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Keeping the books
- Financial statements
- Managing your business cashflow
- Taxation requirements
- Rules and regulations affecting business finances

The topic ‘Managing your business cashflow’ is identical to the topic of the same name in the competency ‘Undertake financial planning’.
**Special features**

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

**Basic bookkeeping**

Learners are asked to select the journal in which details from various receipts are to be entered. They then need to place the appropriate entries in the correct columns of the journal.

**Working capital**

Learners investigate the effect of different payment options on the working capital requirements of a business.

**Downloads**

The following downloads are available in this competency.

In the topic 'Keeping the books'

- **Example journals** – Samples from the following types of journals: cash receipts, cash payments, purchases and sales.
- **The basic accounting rules of double entry bookkeeping** – A short list of double entry bookkeeping 'rules'.
- **How to prepare a bank reconciliation** – A list of steps for checking a bank statement against journal entries.

In the topic 'Financial statements'

- **Balance sheet of Beatrice Stow** – A sample balance sheet.
- **Sample profit and loss statement** – A sample to show learners what a profit and loss statement looks like.
- **Ratio analysis** – A list of profitability and liquidity ratios, how they are calculated and what they tell you about a business.
- **Financial ratios** – A list of ratios relating to stock and debtors, how they are calculated and what they indicate.
- **Financial stability ratios** – A list of ratios relating to the liquidity and long-term financial stability of a business, how they are calculated and what they indicate.
In the topic 'Taxation requirements'

- **Business or hobby?** – Factors used to determine whether an activity constitutes a business or a hobby.
- **Australian Business Numbers (ABNs)** – Information relating to ABNs, including who is and is not entitled to register.
- **Capital Gains Tax (CGT)** – Some detailed information relating to this tax.
- **Alienation of personal services income** – Details of the tax laws relating to personal services income.
- **Home office expenses** – Details about business expenses that may be claimed as tax deductions when working from home.

In the topic 'Rules and regulations'

- **Employment records** – Details of the kinds of employment records that need to be kept for taxation and regulatory purposes.

In the activity 'Cashflow forecast'

- **Blank business cashflow spreadsheet** – An Excel spreadsheet which learners can use as a template for a cashflow for their own business.

**Relevance to other competencies**

Useful additional material for this competency is found in the following competencies.

- Establish business and legal requirements
- Monitor a safe workplace
- Undertake business planning

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Monitor and manage business operations
- Undertake financial planning
Monitor and manage business operations

The materials in this competency are concerned with the operation of a business and the implementation of the business plan. Strategies presented involve monitoring, managing and reviewing operational procedures of a small business.

The task for this competency is to develop several operational plans for different aspects of a business, including a written procedure for a process, an outline of the key operations of the business, an action plan for business objectives, a customer service charter, some benchmarks for products or services and a staff management plan. The business may be a workplace with which the learner is familiar such as their own business, or one of the 'Example businesses' provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Managements systems
- Quality assurance
- Risk management
- Networking

Special features

The content of this competency covers the underpinning knowledge and theories relating to the operational aspects of a business. Therefore the learning activities focus on the learner undertaking research to further expand and broaden their understanding of the concepts covered in this resource.

As a trainer, you may like to provide additional guidance and assignments that focus the learner on tasks that allow them to demonstrate their understanding of this unit.
Downloads

The following downloads are available in this competency.

In the topic 'Management systems'

- **Gantt charts** – Details about Gantt charts - their component parts, how they are constructed and what they tell you.
- **Flow charts** – Details about the different symbols used in flowcharts and when they are used. An example of a flowchart is also provided.
- **A sample cashflow statement** – A cashflow forecast with sample data to illustrate how predictions can be made of cash availability over an extended period of time. (A blank cashflow forecast in Excel spreadsheet format is available in other competencies in this Toolbox – refer to Manage finances, Undertake business planning and Undertake financial planning.)

Relevance to other competencies

Useful additional material for this competency is found in the following competencies.

- Establish business and legal requirements
- Manage a small team
- Manage finances
- Monitor a safe workplace
- Promote the business
- Undertake business planning

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Coordinate implementation of customer services strategies
- Manage a small team
- Undertake business planning
Monitor a safe workplace

The materials in this competency aim to make learners aware of their responsibilities to implement and monitor occupational health and safety (OH&S) policies, procedures and programs within their business to meet legislative requirements.

The task for this competency is to prepare a safety report for a specific workplace, which may be a workplace with which the learner is familiar such as their own business, or one of the ‘Example businesses’ provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Rules and regulations
- Identifying hazards
- Controlling hazards
- Training and involving staff

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Office safety check and Workshop safety check

Learners are asked to identify hazards and choose the most suitable control methods for each of these.

Safety at work

Learners make decisions about appropriate actions to be taken in a situation where OH&S is an issue, and see the consequences of these decisions. Multiple pathways through this activity are possible.

Safety training in a workgroup

Learners ‘interview’ three staff members working in a packaging company to find out the specific strengths of each. They are then asked to identify appropriate staff members to fill each role in a health and safety training program at the company.
Downloads

The following downloads are available in this competency. Most of the checklists can be used for activities within the competency or as checklists for identifying hazards or training needs in the workplace. The interview checklist applies specifically to the interactive activity ‘Safety training in a workgroup’.

- Chemicals checklist
- Hazards assessment checklist
- Risk assessment
- Safe machinery checklist
- Safety inspection checklist
- Training needs assessment checklist
- Interview checklist

Relevance to other competencies

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Establish business and legal requirements
- Manage a small team
- Manage finances
- Monitor and manage business operations
- Undertake business planning
Promote the business

The materials in this competency aim to give learners the skills needed to develop and implement marketing strategies and monitor and improve market performance.

The task for this competency is to develop a marketing plan for a product or service. The business to which these relate may be a workplace with which the learner is familiar such as their own business, or one of the 'Example businesses' provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Marketing planning
- Market analysis and research
- The marketing mix
- Evaluation

The topic ‘Market analysis and research’ is identical to the topic of the same name in the competency ‘Research business opportunities’.

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Customer satisfaction survey

Learners are asked to determine the effectiveness of particular survey questions. This activity is identical to the activity of the same name in the competency ‘Research business opportunities’.
Downloads

The following downloads are available in this competency.

In the topic 'Marketing planning'

- **Sample marketing plan** – This is a sample marketing plan for a cabinet-making business, which learners may like to refer to for ideas for their own marketing plan.

In the activity 'Researching the market'

- **Market research checklist** – A checklist to help learners clarify their concept of the product or service they offer and subsequently determine the scope of their market research activities.

Relevance to other competencies

Useful additional material for the task in this competency is found in the competency 'Undertake business planning'.

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Coordinate implementation of customer service strategies
- Monitor and manage business operations
- Undertake business planning
Research business opportunities

The materials in this competency aim to give learners the skills to investigate and research available business opportunities and assess their feasibility.

The task for this competency is to prepare a research report examining the viability of a business opportunity. This business opportunity may relate to a workplace with which the learner is familiar such as their own business, or one of the example businesses provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Personal business skills
- Identifying business opportunities
- Accessing information and advice
- Defining your market
- Market analysis and research

The topic ‘Market analysis and research’ is identical to the topic of the same name in the competency ‘Promote the business’.

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Feasible business ideas

This activity provides an opportunity for learners to see the results of insufficient planning without risking their own business.

Gaining staff input for a SWOT analysis

Learners are asked to determine whether given statements refer to strengths, weaknesses, opportunities or threats.

Customer satisfaction survey

Learners are asked to determine the effectiveness of particular survey questions. This activity is identical to the activity of the same name in the competency ‘Promote the business’.
Matching services to needs

Learners are asked to consider how various services offered by a particular business satisfy the needs of different customers.

Downloads

The following downloads are available in this competency.

In the activity 'Testing feasibility'
- Feasibility study checklist – A checklist to help determine the feasibility of a business idea.

In the activity 'Conducting a SWOT analysis'
- SWOT analysis worksheet – A table in which to list the strengths, weaknesses, opportunities and threats for a business.

In the topic 'Researching the market'
- Market research checklist – A checklist to help learners clarify their concept of the product or service they offer and subsequently determine the scope of their market research activities.

Relevance to other competencies

Some of the material in this competency is also relevant as useful additional material for the competency 'Undertake business planning'.
Undertake business planning

The materials in this competency aim to give learners the skills they need for researching and developing a business plan to achieve business goals and objectives.

The task for this competency is to develop a business plan for a specific business, which may be a business with which the learner is familiar such as their own, or one of the ‘Example businesses’ provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency include background for establishing a business plan and the different sections in the business plan itself. The topics are as follows.

- The reasons for planning
- What is a business plan?
- Mission, goals and objectives
- Developing a business plan
- The financial section
- The marketing section
- The operations section
- The staffing section
- Tapping specialist services
- Risk in business
- Business plan proforma
Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Jo starts a business

Learners make decisions about the level of planning required when starting a small business and see the consequences of their decisions. Multiple pathways through this activity are possible.

Classifying mission, goals and objectives

Learners are asked to decide whether various statements form part of the mission, goals or objectives of a business.

A business plan for staff

Learners answer questions about the parts of business plans appropriate for sharing with staff who are concerned about the way a business is being run. Multiple pathways through this activity are possible.

What business plans apply

Learners are asked to decide the most appropriate type of business plans for given situations.

Matching services to needs

Learners are asked to think about various aspects of a marketing concept to set up services in a pizza shop that satisfy diverse needs of customers. This is identical to the activity of the same name in ‘Research business opportunities’.

The cost of finance

Learners start with $10,000 cash and choose what to do with this. Their options are to purchase stock for a business to sell, deposit money to a savings account or borrow more money to purchase more stock. Income is generated when stock is sold, providing more cash for learners to work with. The amount of stock sold each month varies randomly.

A summary is provided at the end of the activity showing learners how much their assets have increased or decreased and the cost of any money they have borrowed.
Downloads

The following downloads are available in this competency.

In the activity 'Your own business cashflow forecast'

- **Blank business cashflow** – An Excel spreadsheet which learners can use as a template for a cashflow for their own business.

In 'Your task'

- **Business plan template** – A sample set of headings which learners may like to use for their own business plan.

In the activity 'Progress monitoring strategies'

- **Business monitoring strategies checklist** – A checklist of suggested strategies which learners could use to monitor the progress of their business.

Relevance to other competencies

Useful additional material for this competency is found in the competencies.

- Coordinate implementation of customer service strategies
- Establish business and legal requirements
- Monitor a safe workplace
- Monitor and manage business operations
- Promote the business
- Research business opportunities
- Undertake financial planning

Some of the material in this competency is also relevant as useful additional material for the following competencies.

- Promote the business
- Manage a small team
- Monitor and manage business operations
Undertake financial planning

The materials in this competency aim to give the learner they skills they need to develop a financial plan to support business viability.

The task for this competency is to prepare a financial plan for a business. This business may be a workplace with which the learner is familiar such as their own business, or one of the ‘Example businesses’ provided within the Toolbox. Trainers may choose to use this task or an adaptation of this task as part of the assessment for this competency.

The topics covered in this competency are as follows.

- Business viability
- Budgeting and control
- Costing and pricing for your business
- Managing your business cashflow
- Taxation
- Raising finance

The topic ‘Managing your business cashflow’ is identical to the topic of the same name in the competency ‘Manage finances’.

Special features

As well as a number of discussion starters, research and practical activities, the following interactive activities are included in this competency.

Seeking finance

Learners are asked to choose appropriate actions when seeking business finance from a bank. Multiple pathways through this activity are possible.

Production costs budget

This is a costing exercise for a small manufacturing business.

Sales revenue

This is an exercise in calculating sales volumes needed to reach various profit targets.
**Chargeout rate**

Learners calculate the hourly rate that should be charged for services in order to cover costs and attain a desired income.

**Retail markup**

Learners calculate the markup needed on goods sold to cover costs and attain a desired income.

**Downloads**

The following downloads are available in this competency.

In the topic 'Business viability'
- **Determining working capital needs** – A brief outline of how a business can determine its capital needs.

In the topic 'Costing and pricing for your business'
- **Formulas for costing and pricing calculations** – A listing of the formulas used to calculate contribution margin, various factors relating to breakeven, margin of safety, sales volume for various profit levels, operating income and percentage markup.
- **Peter's chargeout rate calculation** – A sample calculation of how much a person should charge for their services to cover costs and attain a desired income. This example will be helpful when undertaking the interactive activity ‘Chargeout rate’.

In the activity 'Sales revenue'
- **Sample pricing calculations** – Worked examples of calculations involving breakeven and cost volume profit analysis. This applies several of the formulas from the download 'Formulas for costing and pricing calculations'.

In the topic 'Taxation'
- **Business or hobby?** – Factors used to determine whether an activity constitutes a business or a hobby.
- **Australian Business Numbers (ABNs)** – Information relating to ABNs, including who is and is not entitled to register.

In the topic 'Raising finance'
- **Features of debt products** – Brief descriptions of the various different kinds of debt products available (overdraft, business loan, commercial or bank bills, etc) including when and how they apply and how to choose between them.
In the activity 'Personal financial worth'

- **Personal financial worth statement** – A proforma to help calculate the value of assets owned and the amount of money owed, to give a picture of overall 'worth'.

In the activity 'Monthly financial commitment'

- **Monthly financial commitment** – A proforma to help calculate monthly personal expenses to give a picture of current commitments.

In the activity 'Start-up costs'

- **Start-up costs schedule** – A list of typical expenditure incurred by a newly established business. This can be used as a guide for the expenses that may be incurred when starting a business.

In the activity 'Your own business cashflow forecast'

- **Blank business cashflow spreadsheet** – An Excel spreadsheet which learners can use as a template for a cashflow for their own business.

**Relevance to other competencies**

Useful additional material for this competency is found in the competency 'Manage finances'.

Some of the material in this competency is also relevant as useful additional material for the competency 'Undertake business planning'.