

DR47 04 (CFAMLB1) — Develop and Implement Operational Plans for your Area of Responsibility

Overview

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.

The Unit is recommended for middle managers.

This Unit is linked to Units:

B6 Provide leadership in your area of responsibility

D6 Allocate and monitor the progress and quality of work in your area of responsibility

E2 Manage finance for your area of responsibility

F3 Manage business processes

in the overall suite of National Occupational Standards for Management and Leadership.

Additional Information

Behaviours

- 1 You constantly seek to improve performance.
- 2 You work towards a clearly defined vision of the future.
- 3 You present information clearly, concisely, accurately and in ways that promote understanding.
- 4 You reflect regularly on your own and others' experiences, and use these to inform future action.
- 5 You prioritise objectives and plan work to make best use of time and resources.
- 6 You set demanding but achievable objectives for yourself and others.
- 7 You create a sense of common purpose.
- 8 You balance agendas and build consensus.
- 9 You consider the impact of your own actions on others.

Skills

Listed below are the main generic 'skills' that 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

Performance Criteria — What you do in your job

You must provide evidence to meet all the 8 Performance Criteria for this Unit. The Performance Criteria are grouped under headings to assist you with planning how best to meet these points.

Place the number of the piece of work where this Performance Criteria has been met in the evidence box after each criteria.

	Performance Criteria	Evidence Number where this criteria has been met
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.	

Knowledge and Understanding — Why and how you do what you do in your job

You must provide evidence of your knowledge and understanding to meet all the 23 knowledge points for this Unit. The knowledge points are grouped under headings to assist you with planning how best to meet them.

Place the number of the piece of work where each knowledge point has been met in the 'evidence number' box after each point.

General Knowledge and Understanding

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
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

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
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.	
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.	

The candidate and assessor must only sign below when all Performance Criteria and knowledge points have been met.

Unit assessed as being complete

Candidate's name	
Candidate's signature	
Date submitted to Assessor as complete	

Assessor's name	
Assessor's signature	
Date assessed complete	

Internal Verification

To be completed in accordance with centre's internal verifier (IV) strategy.

Evidence for this Unit was sampled on the following date/s	Internal verifier's signature	Internal verifier's name

This Unit has been subject to an admin check in keeping with the centre's IV strategy.

Date of admin check	Internal verifier's signature	Internal verifier's name

Unit completion confirmed

Internal verifier's name	
Internal verifier's signature	
Date completed	