
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. This standard is about developing that operational plan.

This standard is relevant to managers and leaders with responsibility for developing operational plans for their area of responsibility.

This standard must take account of the organisation's strategy as defined in *CFAM&LBA5 Develop your organisation's vision and strategy* and *CFAM&LBA6 Develop strategic business plans*. The implementation of operational plans is covered in *CFAM&LFA2 Implement operational plans*.

Performance criteria

- You must be able to:*
- P1 Engage appropriate people within your area of responsibility and other key stakeholders in developing operational plans.
 - P2 Develop operational plans that are consistent with organisational values and strategy and the specific objectives of your area of responsibility.
 - P3 Ensure the operational plan complements and exploits synergies with other areas within the organisation.
 - P4 Consider both innovative approaches and tried-and-tested solutions.
 - P5 Evaluate the risks involved and develop realistic plans to manage significant risks.
 - P6 Identify resource requirements and evaluate their availability both now and in the future.
 - P7 Identify reliable indicators and methods for monitoring and evaluating the plan.
 - P8 Communicate the plan in ways that engage the commitment of those involved and the support of other key stakeholders.
 - P9 Review and redefine the operational plan, in the light of changes to organisational strategy or the operating environment.

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 How to engage employees and stakeholders in operational planning.
- K2 Principles and methods of short to medium-term planning.
- K3 The importance of creativity and innovation in operational planning.
- K4 How to develop and assign objectives which are SMART (Specific, Measurable, Agreed, Realistic and Time-bound).
- K5 How to analyse and manage risk.
- K6 How to develop and plan for contingencies.
- K7 How to identify resource requirements and evaluate their availability and sustainability.
- K8 How to develop and use an evaluation framework.
- K9 The principles and methods of effective communication, and how to apply them.

You need to know and understand:

Industry/sector specific knowledge and understanding

- K10 Legal, regulatory and ethical requirements in your sector.
- K11 Significant trends and developments in your sector.
- K12 Actual and potential competitors, and their strategies and plans.
- K13 Actual and potential collaborators, and their strategies and plans.

You need to know and understand:

Context specific knowledge and understanding

- K14 Your organisation's operating environment.
- K15 The overall vision of your organisation and the objectives you are responsible for achieving.
- K16 Your organisation's actual and potential customer base.
- K17 Opportunities in your organisation's operating environment.
- K18 How to respond to opportunities in your organisation's operating environment.
- K19 Colleagues and other key stakeholders, and their needs and expectations.
- K20 Processes for engaging with employees and their representatives within your organisation.

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K21 Sources of information you can use to monitor and evaluate plans.

Behaviours

When performing to this standard, you are likely to demonstrate the following behaviours:

- 1 Seize opportunities presented by the diversity of people
- 2 Seek opportunities to improve performance
- 3 Encourage, generate and recognise innovative solutions
- 4 Present information clearly, concisely, accurately and in ways that promote understanding
- 5 Reflect on your experiences and use the lessons to guide your decisions and actions
- 6 Agree challenging but achievable objectives
- 7 Prioritise objectives and plan work to make effective use of time and resources
- 8 Create a sense of common purpose
- 9 Take account of the impact of your own actions on others
- 10 Work towards a clearly defined vision of the future

Skills

When performing to this standard, you are likely to demonstrate the following skills:

- Building consensus
- Communicating
- Consulting
- Decision-making
- Delegating
- Evaluating
- Influencing
- Innovating
- Involving others
- Persuading
- Planning
- Presenting information
- Prioritising
- Reflecting
- Reviewing
- Risk management
- Setting objectives

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