

**T Level Technical Qualification in  
Management and Administration  
(8715-30)**

**8715-033 Employer-Set Project  
Exemplar – A Grade  
Summer 2023**

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# Introduction

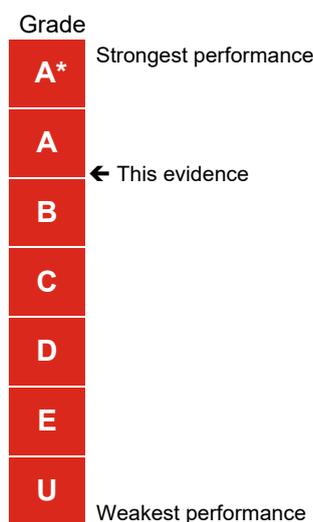
## Summer 2023 Results

This document is aimed at providers and learners to help understand the standard that was required in the summer 2023 assessment series to achieve an A grade for the 8715-033 Management and Administration Employer-Set Project (ESP).

Providers and learners may wish to use it to benchmark the performance in formative assessment against this to help understand a potential grade that may be achieved if a learner was to attempt the next summative assessment series.

The Employer-Set Project is graded A\* to E and Unclassified.

The exemplar evidence provided for the 8715-033 Management and Administration Employer-Set Project (ESP) for the A grade displays the holistic standard required across the tasks to achieve the A grade boundary for the summer 2023 series.



The Employer-Set Project brief and tasks can be downloaded from [here](#).

### Important things to note:

- We discussed the approach to standard setting/maintaining with Ofqual and the other awarding organisations before awarding this year. We have agreed to take account of the newness of qualifications in how we award this year to recognise that students and teachers are less familiar with the assessments (Vocational and technical qualifications grading in 2023 – Ofqual blog), whilst also recognising the standards required for these qualifications.
- The exemplar evidence presented, as a whole, was sufficient to achieve the A grade. However, performance across the tasks may vary (i.e. some tasks completed to a higher/lower standard than an A grade).

Marking of this Employer-Set Project is by task and Assessment Objective, below is a summary of these along with the mark achieved by the evidence presented and the maximum mark available for each aspect.

Task	Assessment Objectives	Mark achieved	Max mark available
<b>Task 1.1 Investigate the project brief</b>	- AO1 Plan their approach to meeting the project brief - AO3 Select relevant techniques and resources to meet the brief	2	6
	- AO2a Apply core knowledge	3	6
	- AO2b Apply core skills - AO4a Use of Maths skills	5	8
<b>Task 1.2 Project Initiation Document (PID)</b>	- AO1 Plan their approach to meeting the project brief - AO3 Select relevant techniques and resources to meet the brief	6	8
	- AO2a Apply core knowledge - AO2b Apply core skills	7	9
<b>Task 1.3 Project planning</b>	- AO1 Plan their approach to meeting the project brief - AO3 Select relevant techniques and resources to meet the brief - AO4a Use of Maths skills	7	9
	- AO2a Apply core knowledge - AO2b Apply core skills	7	8
<b>Task 1.4 Presentation</b>	- AO2a Apply core knowledge - AO2b Apply core skills	8	9
	- AO4b Use of Digital skills - AO4c Use of English skills	9	10

Task	Assessment Objectives	Mark achieved	Max mark available
<b>Task 2.1 Collaborative problem solving</b>	<ul style="list-style-type: none"> <li>- AO1 Plan their approach to meeting the project brief</li> <li>- AO2a Apply core knowledge</li> </ul>	5	6
	<ul style="list-style-type: none"> <li>- AO2b Apply core skills</li> </ul>	5	6
<b>Task 2.2 Evaluation</b>	<ul style="list-style-type: none"> <li>- AO2b Apply core skills</li> <li>- AO5a Realise a project outcome</li> <li>- AO5b Review how well the outcome meets the brief</li> </ul>	10	15

## Task 1.1 Investigate the project brief

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	1.1 Investigate the project brief
<b>Evidence title / description</b>	(i) Research (ii) Outcome of research (iii) Determine a solution
<b>Date submitted by candidate</b>	DD/MM/YY

## 1.1 Investigating the Project Brief

### (i) Research

Strengths	Weaknesses
<p>A strength of Truck Chief Ltd is that they already have the storage infrastructure in place, we know this from looking at their KPI's due to them already having quite a large capacity and working under this, we are able to handle to new contract without expansion. This is useful as it saves the company money and time as we do not have to search for a new location or expand upon the current one. This allows staff to feel comfortable as we are not constantly changing and already have systems and processes in place for this facility.</p> <p>Another strength of Truck Chief Ltd is their safe practices, in the 3<sup>rd</sup> period they only 3 near misses to report which for a company in their sector is very low, with the average being 222 incidents per 100,000 employees (<u>HSE</u>). This creates a much more productive and happier workforce as they feel much safer in their workplace and do not feel they are at risk. This is a major strength for a company like Truck Chief as they can rely on their staff.</p>	<p>Currently Truck Chief faces a lack of technological advancement, this is an issue as the way the world is moving, it is vital for them to implement technologies that allow them to streamline their processes and make their employees job easier by allowing for clear information and data at the press of a button, failure to go through with technological advancement will cause them many problems in the long term as we move into a more digitalised world and if they are unable to show they are innovative and progressive they may lose partners over this matter.</p> <p>In the previous KPI we can identify shortcomings in the Skills Matrix, the main one of which being the stock put away, we need to ensure that we are efficient as we can be, we need to be a well-oiled, highly functioning machine to ensure both employee and customer satisfaction. Failure to do this can lead to us not delivering on promises in contracts and staff feeling demotivated as they feel as if they are bad at their job. We need to ensure all staff receive the highest level of training possible and feel confident in their position or the Skills Matrix will begin showing more ambers and reds.</p>
<p>A major opportunity Truck Chief has is their new contract, they should use this to its maximum taking all the opportunities it gives as it will lead to much bigger opportunities in the future, for this Truck Chief must go above and beyond partners are satisfied with their service, this is one of the core values of the company so it is of paramount importance that this opportunity is integrated and served well and to our best ability which will lead to much bigger and better business in the future.</p> <p>An ability Truck Chief has is Staff Development. Currently at least 30 staff members work in the warehouse per day, to ensure we are able to keep hold of these skilled staff we need to give opportunities to them to ensure we get opportunities to use them back, giving the staff the ability to specialise allows for much higher quality work and a happier workforce as they feel valued, making them more likely to do more for the company and improve on their work, creating more opportunities for Truck Chief.</p>	<p>Compared to most corporate giants, Truck Chief is quite a small logistics company with us only having one location. The larger firms have bigger budgets, more recourses and more people, to ensure we stay prominent we need to offer what they cannot. We need to ensure we have high levels of communication and can achieve our customers' needs to meet a high and efficient standard. This will be what separates us from the giants, but we must keep standards high to stay on top of this.</p> <p>Another threat is our location, currently Truck Chief only has one location in Manchester, this is highly inefficient if we are commuting to places like London or the Scottish Highlands as it is a much further journey, other logistics services strategically place their warehouses to make up for this. As we are only small Manchester does work well as it is quite central within the UK, but it does restrict what contracts we get to the Manchester area, allowing other companies to take potential business from us. In the future we need to look at expanding over different regions to prevent this.</p>
Opportunities	Threats

## PESTLE Analysis

### Political

A major focal point in the Logistics Industry at the moment is Brexit, Brexit has caused major issues for companies in the logistics sector such as a lack of drivers, toughened import/export laws and increased duties abroad. This has led and still is leading to set backs within the logistics industry and is therefore affecting Truck Chief. To ensure we can work around this issue we need to ensure we have the correct systems and paperwork in place before importing/exporting goods and that we follow all legislation for those countries to ensure we can uphold our reputation.

Another current issue facing the Logistics sector is striking, most recently with Royal Mail, staff in the Warehouse/Logistics sector need to feel like they are safe and wanted, we need to show this by rewarding staff and ensuring we recognise them to prevent strike action, for this we need to ensure all our affairs are in order internally, making it a safe and open space for staff to talk should be the top of our list if we want to ensure our staff feel comfortable within the workplace.

### Economical

With the Logistics Industry being worth 8.43 Trillion Euros in 2021 and projected growth to 13.71 Trillion Euros in 2027 ([Statista](#)) the Logistics Business seems a safe bet to get into, but it is still a risky business filled with disruptions and a lack of staff to fill the roles needed, it requires a lot of planning and a lot of luck. With Truck Chief only being a small business, it still has a very high chance of failure as it does not have the infrastructure in place to deal with this very competitive market, with big names like Amazon, Evri, DPD, Royal Mail, UPS, FedEx, the list goes on of these corporate giants you have to fight against.

With the current price of gas and electricity, powering a big warehouse costs a lot of money, especially being open 24 hours a day, if Truck Chief does not look into more sustainable solutions for these items the cost of running the warehouse alone will be astronomical. The installation of solar panels could allow Truck Chief to save large amounts of money per year.

### Social

The Cost of Living crisis has caused many people to begin thinking more about how they spend their money, looking at ways to cut down on costs as they simply do not have the funds for it, this could be an issue for Truck Chief due to them mainly supplying high-fashion goods and as people do not have the extra money to spend on these items it could lead to a lack of sales and therefore a lack of movement through the warehouse.

Another issue currently faced is in the healthcare industry, currently the NHS is losing staff and a major loser in this is the dentistry industry, from 2020 – 2022 more than 2000 dental practices left the NHS and have went private ([Dentistry](#)), to ensure staff are happy and well cared for Truck Chief could offer employee benefits including dental care and other important services while working in a warehouse, such as physiotherapy to ensure staff are in their peak physical condition and do not have to take time off due to health issues.

## Technological

The logistics sector has developed massively since the millennium, with services like Amazon and their in-house next day delivery (Prime) which was developed in 2005, people expect there to be fast delivery and great customer service because of services like these, this has created a set expectation of the modern delivery service and if Truck Chief fails to deliver on this they can be left behind.

Another technological aspect would be the advancement of WMS systems, which now integrate your entire businesses service allowing the most streamlined experience possible, with live updates on stock, locations of items when picking and even CRM integration in-case a customer has any special requests, Truck Chief must ensure they have the most up to date WMS software if they want to achieve their values.

## Legal

A big issue Truck Chief could face is about labour laws, for example the working time directive, if they fail to get the employee to sign a release they could face major fines/penalties. Ensuring that paperwork is completed and following the laws to a T is paramount for Truck Chief to be seen as a good employer and to ensure to stand by their company core values.

Another major legal issue in the logistics industry is data protection, if you fail to ensure that customers receive the correct parcels or if you have a data breach of any kind, you are likely to have released their addresses and other personal information, it is vital that Truck Chief has good and correct GDPR procedures in place to ensure they are protected from this and if the worst does happen, they are prepared to tackle it.

## Environmental

The logistics industry is one of the biggest polluters in the world, producing around 24% of the worlds CO2 and greenhouse gasses (CarbonCare). Amazon has invested \$1bn (£880m) in creating a more sustainable and environmentally friendly business model in the UK and Europe, mainly investing in Electric Delivery Vans and are looking to offset its carbon emissions in its warehouses. This is simply not feasible for a smaller business and may cause them to be bullied out of the industry due to increased pressures to do so. With a fully electric van costing around £6,000 more (Mercedes Sprinter) and being shorter, putting a choke hold on smaller companies to the more affordable options.

Another big polluter is employees commuting to work, you do not normally see warehouses in city centres or populated areas, they are normally on the outskirts of cities, this means staff must commute to work, if Truck Chief wants to look how to be more environmentally friendly, they could offer a shuttle bus service, reducing the number of vehicles on the road or look at a cycle to work scheme.

(ii) Outcomes of Research

Finding	Qualitative or Quantitative
Autoload Bailer – will allow for shelves to be cleared of packaging as we are able to sell it once bailed	Qualitative
Cardboard Sales – Using the Bailer we can sell Cardboard for around £60 per tonne depending on amount and who we are selling too.	Quantitative
Smart Shelving – Allows for easier tracking and moving of stock, reducing use of staff and manned forklifts	Quantitative and Qualitative
WMS – Allows to keep track of activities within the warehouse and streamline processes	Qualitative
CMS – Works collaboratively with the WMS to provide customers with updates to allow for the highest level of service possible.	Qualitative
Automated Warehouse – Allows for staffing to be cut significantly and is less likely to make mistakes/have issues compared to regular staff.	Qualitative and Quantitative
Solar Panels – Creates a more sustainable and allows for lower overall running costs of the warehouse, opens us up to more staff recruitment as staff look for greener workplaces.	Quantitative
Staff Benefits – Allows staff to feel more welcome and prepared to work, leading to higher workflow and motivation.	Qualitative

(iii) Determine a Solution

1 -

WMS software will play a vital part in the development and modernisation of Truck Chief Ltd, from my research I have found that WMS systems cost around \$5,000 (£4,036) per month for an enterprise scale organisation such as ourselves ([ExploreWMS](#)). This comes to a cost of around £50,000 per year. This will allow for us to streamline processes and create a much more productive working environment. Referring to the Problem Areas from the period 3 KPI, we see a problem area we face is Technology, implementing this will allow us to put our best foot forward and make all other processes much easier as technology takes up the slack in areas we are currently behind in, such as stock discrepancies, using this WMS software will allow us to identify and investigate discrepancies much quicker and easier than before, this is currently one of our drawbacks in our Stock Processing KPIs.

To address the other clear drawbacks within the Processing KPI's, we will look to use Oracle NetSuite/Logistics WMS, which has an implemented CRM making it easier to communicate with customers and allowing customer service queries being answered within 48hrs to become more likely as the system in place is developed to assist in this, there is also several case studies showing it being implemented in similar uses to our companies ([Oracle](#)) using this system will allow the company to achieve all its values in a more efficient and cost saving way.

Implementation of this WMS will be very efficient as it is managed by Oracle, we can work with them to deliver a full package of technologies and equipment that will work well with this WMS as Oracle is the 3<sup>rd</sup> largest software development company in the world and has recourses that will benefit us massively as a company and working with them to develop this infrastructure will create a long-lasting and sustainable solution for Truck Chief Ltd. This also resolves the use of agency staff as using a WMS makes the warehouse much more efficient and eliminated timely processes.

Automated warehouse systems are apparently the future of warehousing, with little human input needed, robots can go around the warehouse whether it be sorting, picking, packing; the robot can do it. This is highly beneficial as people no longer need to be paid, you have no constant Health and Safety issues and you can operate 24/7 365 without the worry of staffing issues. The automated system maximises space and using highly trained and programmed AI it barely makes mistakes.

Using this system allows for all KPI issues to be resolved, with Truck Chief mainly storing high fashion goods it also protects against employees stealing items and allows for items to be delivered with maximum efficiency, which is what those who are in the market for high-end luxurious products want, high levels of service and quick turnaround times.

This implementation will be very costly though, with prices ranging from around £1m to £25m ([ShipHero](#)), the budget we have means we simply cannot afford this option and it is over the top for what Truck Chief needs at the moment. The current setup in place is more than enough to handle this up coming contract, but this automated system would massively benefit them in future implementation if they chose to do so.

Therefore, I have decided to go with option 1, it is more cost and time efficient, allows us to keep hold of our experienced staff team and will be overall more beneficial for the company. While it is not the futuristic model, it is the safest and most efficient model for modern day usage and for Truck Chiefs organisational size, the implementation of my suggest solution will assist in the addition of this in the future as it has the same fundamentals and will allow the organisation to adapt to this much quicker and in a more effective manner.

Item	Cost	Quantity	Use	Total cost
Oracle NetSuite/Logistics	£4,036pm	12	WMS used throughout entire warehouse, streamlining processes.	£48,432
Technology alongside NetSuite	£20,000 (estimated)	1	Scanning equipment, tablets and other recourses for the WMS.	£20,000
Cardboard Bailer	£42,018.12	1	Allows us to sell cardboard that is no longer needed/unclutters shelves	£42,018.12
Cardboard Sales	(£60 per tonne)	365 (tonne a day average)	Sale of cardboard now we have use of the bailer.	(£21,900)
Training Costs (refresher course)	£100 per person	50 (estimated)	Ensure staff are up to date on our processes.	£5,000
Solar Panels	£500 per unit ( <a href="#">GreenMatch</a> )	25	Allows us to promote sustainability and reduces costs.	£12,500
Employee Benefits (Physiotherapy)	£75 per hour ( <a href="#">myTribe</a> )	50 (estimated)	Allows staff to be more efficient as they have peace of mind.	£3,750
Total Costings:				£109,800.12

## Task 1.2 Project Initiation Document (PID)

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	1.2 Project Initiation Document (PID)
<b>Evidence title / description</b>	Project Initiation Document (PID)
<b>Date submitted by candidate</b>	DD/MM/YY

# Project Initiation Document (PID) Template

The size of fields within the tables below are not indicative of the expected learner responses, tables below can be expanded, and additional rows added as needed. If learners are to hand write their response, tables will need to be expanded prior to printing or extra paper shared.

## Project Information

Project Name	Truck Chief Development Plan
Date	DD/MM/YY
Author/Project Manager	<first name> <surname>
Version	V1.1

## Document Approval

Date	Name	Signature
19/4/2023	Francesco Bernoulli	

## Background and Scope

Truck Chief is a warehousing and distribution organisation based in Manchester with a key market of high-fashion goods. Their single warehouse is in operated 24/7 made up of 1480 storage locations. Their daily processes include receiving stock and storing it then the picking, packing and dispatching of stock. Having undergone a major amount of changes in the past 18 months with changes in contracts and other items, the organisations KPI's have been affected. Truck Chief currently faces two main issues; a lack of permanent staff and a lack of technology to support their business. With this project we hope to mitigate these issues and find long term solutions to ensure they can support the long-term growth of Truck Chief.

## Project Rationale

Truck Chief has recently won a new major contract, the organisation must implement this without it effecting the running of all other operations within its warehouse, this must be done effectively, timely and efficiently to ensure Truck Chief is able to deliver on this contract and keep on-top of all its current affairs. Truck Chief has four core values they operate by: Exceeding customer expectations, valuing their people and teamwork, sustainability and working safely. In this project we must try and achieve these values and hope we can go above and beyond of what is expected of us. We also hope to reduce costs by trying to remove the use of agency staff and making processes overall more efficient, reducing time wasted by staff.

## Project Aims and Objectives

The main aim of this project is to ensure Truck Chief can handle its new contract while achieving all its core values alongside this. Currently at any given time the warehouse runs at about 75% capacity, with the new contract I would expect this to be going up to around 90% of capacity at any given moment, to ensure our staff can handle this change we propose to use a Warehouse Management System (WMS). This will allow our staff to keep track of products easier and more effectively. The implementation of this should take around a week and the training for it another week while barely disrupting the flow of work. This system will allow for a much more efficient shift as staff do not have to rely on manually calculating stock or having to search everywhere for an item while picking as the WMS is able to direct them to it. This should reduce wasted staff time by up to 80%. This saves Truck Chief a significant amount as it will allow for a major reduction in the need of agency staff, in quieter months we may not even need them. The WMS we have picked also includes a Customer Relationship Management (CRM) software. This will allow for customer requests and queries to be more recognisable to staff and helps the value of exceeding customer expectations.

An objective of this project is to ensure the warehouse stays as environmentally friendly as possible during this rise in work and also economically sustainable with gas and electric prices being exponentially more than normal. For this we propose solar panels, we hope these will produce around 50% of our energy usage per day. The placement and installation of solar energy should be largely achievable due to use having a large building with significant roof space, the installation will only slightly hinder the operations of the warehouse as they should only take around a week to install and most of that time will be spent away from the main floor, allowing work to be as normal. The installation of solar panels will assist in our sustainability value allowing us to demonstrate we are honest and stick to our word.

Another objective we hope to achieve is to increase our staff retention, staff turnover within the logistics industry is remarkably high as it is very physical and mentally draining, with 65% of staff leaving within the first 12 months of their tenure. We hope our new staff benefits scheme and the WMS will reduce the impact on staff, with us offering Physiotherapy to ensure they are in good health physically and access to dental care, giving them piece of mind. We will also look to increase training so staff feel they are more comfortable within their roles and look to offer more opportunities for progression.

Finally, we will look to ensure our staff are as safe as possible, looking into ways of cleaning the warehouse and reducing the number of hazards, for example, waste packaging such as cardboard. With 222 incidents per every 100,000 employees, we want to ensure our staff are safe and that we are protected from any litigation by showing we have measures in place to protect from accidents. This also allows staff to feel much safer and motivates them to work as they know they are in a good, safe environment.

**Budget / anticipated costs**

Total budget	£450,000
Budget breakdown	Costs
Oracle NetSuite/Logistics WMS and CRM	£48,432 per year
Technology needed alongside WMS	£20,000 (Estimated)
Cardboard Bailer	£42,018
Sale of Cardboard	(£21,900) (1 tonne a day estimated)
Refresher Training Cost	£100 per staff member (time and staffing cost)
Solar Panels	£12,500
Employee Benefits Package	£75 an hour (2 offered per year with an estimated 50 employees)
Relief Fund	£50,000 (To be used in any areas where necessary)
<b>Budget Remaining</b>	<b>(£286,499,88)</b> (Returned to finance department)

**Project Management Team**

Role	Reports to
CEO	Board Of Directors
CFO	CEO
COO	CEO
Head Of HR	Upper Management
Project Manager	Management and Directors
Project Co-Ordinators	Project Manager

## Project Key Stakeholders

Name	Role and responsibilities
Board Of Directors	Directors – Responsible for the company, oversee the project from afar and sign off on any major attributes of the project.
Francesco Bernoulli	CEO – Oversees entirety of project, meets regularly with Project Management and reports feedback directly to the board.
Shaquille Johnson	CFO – Oversees budgeting and spending of the project, works to find the most cost-efficient methods of implementation.
Max Stevens	COO – Oversees operational side of the project and ensures all new operation procedures and implemented correctly and staff are aware of and have the correct training for these coming into place.
Guido Ramsey	Project Manager – Works with the management team to ensure project follows with the companies' mission and values and works with Project Staff on implementing the project.
Sally Maxwell	Head Of HR – Works to ensure that employees are happy with recent changes and that they feel safe in their roles.
Employees	Ensure the project works to its maximum ability on the warehouse floor, giving any feedback and ideas that they may have.
Customers	Give feedback on recent purchases with new systems in place, seeing if they notice and benefits/drawbacks of the new processes.

## Project Deliverables

Deliverable details	Format of deliverable	Completion target date
WMS System	Digital	30/5/23
Solar Power	Physical	20/7/23
Staff Benefits	Physical	30/4/23
Cardboard Removal	Physical	15/5/23

## Risks

Risk Number	Risk Details	Risk Level (Low, Med, High)	Risk Mitigation
1	Loss of support	Low	We will have constant contact with upper management and the directors to ensure they are aware of what is happening and can have their say on it to ensure we have their approval.
2	Failure to implement WMS	Low	We will work closely with Oracle to ensure the WMS is effective as possible and that we have all the right technology in place to ensure the WMS can work to its fully ability.
3	Loss of staff	Med	The logistics industry is known for having a remarkably high staff turnover rate due to the work being very physically demanding, we have placed a benefits scheme to try and prevent this but due to the nature of the work we cannot confirm it will work for everybody.
4	Failure of contract	Med	The logistics industry is fiercely competitive, to ensure we keep our competitive edge we have implemented items like a WMS to ensure we can fulfil orders and requests in the most efficient and customer friendly way possible.

5	Bankruptcy		This is a highly unlikely situation due to how I have worked the budget and we are now saving and making more money than we previously were due to the decrease of agency staff and the sale of cardboard.
6	Solar Panel Breakdown		Solar energy is still quite unstable and may breakdown at times, this will not have any effect on the warehouse as we are connected to the main grid, but it may cause us to have to spend more on electricity and for the panels to be serviced/fixd.

### Quality Management Method

For this project and in the long term we will look to try and implement two main forms of Quality Management into Truck Chief, we believe this will have the best outcomes for both our staff and customers.

Currently Truck Chief has a strong use of KPI's and we hope to continue to use these as they have been very beneficial in the planning of this project and have gave great insight into what is happening.

#### 1. Kaizen

The use of Kaizen will allow us to receive direct feedback from our employees and give them the change to try and improve their work, while we are implementing this during the project we will work constantly with staff and receive their feedback and allow them to develop their own ideas as to what they think would be beneficial as they are the ones using all these new processes. After this we will dedicate 2 hours monthly per a employee towards this in the long term, we believe this will create more efficient work and boost employee morale as they have made a direct impact on their work and feel as if they are embedded into the company.

#### 2. Quality Control

While we are implementing these new processes, it is vital Quality Control (QC) is toughened, doing this will allow for us to evaluate how they are working, we will compare this new KPI data to previous to see if we are able to see any benefits of the WMS system and also to see if there are any drawbacks, from this data we are then able to iron them out and ensure it is working to its maximum and we are extracting its full potential as a tool.

Alongside this we will send out surveys to long-term customers to see if they have noticed any differences in our operations, we will do this using a 1-10 systems so we have data that is easy to read and is clear so we are able to constantly improve and give the customer they best experience possible.

## Project Evaluation Method

Within this project we will look to use the PRINCE2 evaluation method this is beneficial as we are constantly evaluating ourselves and the project and therefore constantly finding ways to improve the project or finding ways to implement it quicker or easier.

We will again continue to use KPI's as they give strong indications of how the project is going and will allow us to predict its abilities in the long term and give the best course of action, we can to ensure its longevity and sustainability.

With this we will also communicate with our new WMS provider, Oracle, to see if we can look into one of the places this system has already been implemented, one so we can evaluate it and see its strong and weak points before we even implement it ourselves and two so we can use some of the systems and processes they have in place ourselves to maximise the WMS.

Alongside this we will run staff surveys and forums, have a number of internal audits and once we believe we have achieved all our goals we will have an external audit, this will give us the highest volume of feedback possible and using all of these evaluation methods together will allow us to really define the strong and weak points of this project and then allow us to fix them, which will hopefully give us the most efficient warehouse we possibly can.

## Task 1.3 Project Planning

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	1.3 Project Planning
<b>Evidence title / description</b>	(i) Plan-on-a-page (ii) Justification
<b>Date submitted by candidate</b>	DD/MM/YY

Project Goals	
Truck Chief has recently won a major new contract, to ensure their longevity they are looking at ways to promote continuous improvement and increased efficiency. To ensure we achieve this goal I have developed a solution using a Warehouse Management System, this will allow for Truck Chief to streamline their processes, keep worker downtime to a minimum and keep track of stock and trends. With this I have paired several objectives based on their core values as an organisation, all these factors will work hand in hand to achieve the Directors goals and ensure a long term future for Truck Chief, one that also has a major benefit in the short term with the acquisition of the new contract.	

Project Objectives	
1.Ensure that the warehouse stays environmentally friendly as possible, promoting our value of sustainability. We hope the use of solar panels will reduce the amount of energy we use from the grid by around 50%, reducing our net carbon footprint as an organisation.	
2.Achieve a high rate of staff retention, with 65% of staff leaving the logistics sector within 12 months of joining, we must try and retain our staff as it will save money in training and hiring costs. It will also give us a more experienced range of staff. To do this we will offer staff benefits and try and create opportunities for progression within the business.	
3.Ensure staff are safe and happy within the workplace. With HSE reporting 222 incidents per 100,000 staff and our sector being categorised as high risk, we must do everything to keep our staff safe. We must also look to follow legislation around staff working hours and breaks to ensure we are protected from litigation and to ensure we have a happy team of staff.	

Key Stakeholders	
Name/Role	Role and Responsibilities
Walter Blanco	Chairman of the board. Overviews companies operations, has final word on all projects and matters of the company.
Francesco Bernoulli	Companies Chief Executive. Handles the day to day operations of the company and communicates all feedback to Chairman.
Shaquille Johnson	Chief Financial Officer - Ensures budget has good cash flow and ensures director set budgets are adhered too.
Guido Ramsey	Project Manager - Signs off on all project ideas if he feels they would benefit the company and presents to the CEO/board.
Suppliers	Suppliers need to be kept upto date with the goings on of the Warehouse as it is their product in it, we need to ensure we are giving them our best work.
Employees	Employees need kept up to date as they are the ones operating within the warehouse so they should be aware of any changes.

Deliverables	
Deliverable	Description
Warehouse Management System	Allows staff to keep track of activities within the warehouse and streamline processes, reducing wasted time by up to 80% allowing for a lower workload on staff.
Solar Energy	Creates a more sustainable and allows for lower overall running costs of the warehouse, opens us up to more staff recruitment as staff look for greener workplaces.
Employee Benefits Package	Allows staff to feel more welcome and prepared to work, leading to higher workflow and motivation.
Cardboard Disposal Method	Using the Bailer we can sell Cardboard for around £60 per tonne depending on amount and who we are selling too it also clears wasted space on the shelving.

Resource Support Plan	
Resource	Description
WMS	Build relationship with Cisco to ensure long term support for the WMS system to ensure its longevity in the warehouse.
Bailer	Ensure all Health and Safety protocols are followed while bailer is in use and only the correct materials are put into it.
Solar	Use solar to advantage the company through free electricity and as a promotional tool for the sustainability of the company.
Benefits Package	Ensure staff are in peak condition when working and ensure they feel valued by the company so they are happy.
Staffing	Ensure employment law is followed and staff feel comfortable with working hours, ensure we do not burn out staff.
Warehouse	Ensure it is highly upkeep and all Health and Safety hazards are dealt with effectively and swiftly.

Communication Plan			
Person(s)	Priority	Requirements	Contact Forms
Board Of Directors	10	Up to date information In-depth summaries	Phone, Email, Meetings and face to face
Upper Management	8	Status of project Any effects on operation	Face to Face, Email and Phone
Staffing	7	Updates on project	Staff Newsletter and face to face
Suppliers	7	Updates on project Benefits to them	Conferences, emails and phone calls
Customers	5	How new systems effect their experience	Emails and enquiries
Local Community	3	How this benefits the local community	Bulletins and Newsletters

Risk Management		
Risk No.	Priority (1-10)	Mitigation/Description
1	10	Bankruptcy - While it is highly unlikely, if the company goes bankrupt all of the below risks simply do not matter as they do not exist.
2	8	Failure Of Contract - If this contract falls through we have wasted a large amount of resources and time for no reason at this point.
3	8	Loss Of Support - If the project loses support from the Directors it will lead to a large amount of wasted resources.
4	7	Loss Of Staff - If we lose staff we will have to rely on Agency Staff until replacements are found, both of which are costly.
5	5	Failure Of WMS implementation - This will be very costly as we will have paid out large sums for this system and it will confuse staff.
6	3	Solar Panel Breakdown - Solar Energy can be unstable as it works via the sun but the system as a whole is known to have issues.

Evaluation Methods	
Method	Description
KPI's	Allow us to compare to previous data before the implementation of this project, will also allow us to predict future data.This allows us to plan ahead and be prepared for whatever may happen.
Kaizen	Kaizen will make warehouse operations as smooth as possible as staff are able to implement the best way of working, as they are the people who do this the most, they have the best idea.
Quality Control	Quality Control after the new systems are put in place will be vital as staff are still learning new systems and this may lead to a few hiccups while they are acclimatising to them.
PRINCE2	Using PRINCE2 will allow us to constantly evaluate ourselves and help us to decided where our resources are best placed and are most beneficial to the project overall.

Week Commencing	24/04/2023	01/05/2023	08/05/2023	15/05/2023	22/05/2023	29/05/2023	05/06/2023	12/06/2023	19/06/2023	26/06/2023	03/07/2023	10/07/2023	17/07/2023	24/07/2023	31/07/2023	07/08/2023	14/08/2023	21/08/2023	28/08/2023	04/09/2023	11/09/2023	18/09/2023	25/09/2023	02/10/2023	09/10/2023	16/10/2023	23/10/2023	30/10/2023	06/11/2023			
Surveys			Survey 1										Survey 2																		Survey 3	
WMS		Test			Install		Training		Review																							
Solar								Quote					Install and Testing				Review															
Benefits Roll Out		Initial Roll Out														Review																
Bailer Install/Trials					Install	Trial					Review																					
Internal Audits											Audit 1																					
External Audits																																External Audit
Kaizen Days											Kaizen 1																					Kaizen 5
Progress Review												Review 1																				Review 3

Final Changes Pending External Audit

# Project Plan Summary

## Aims, Objectives and Deliverables – Why?

I chose the aims and objectives for this project based on the companies' core values and the recent KPI data. From this I was able to identify the companies wants and needs from the project while working with the set criteria of continuous improvement and increased efficiency. This is where my idea of implementing an up-to-date WMS would benefit the staff and allow them to reach their KPI's more effectively and efficiently. It would also allow for a much more efficient service for the customers and reduce the need for agency staff as use of the WMS would decrease wasted staff time by 80% making up for a major portion of the hours, we needed to be covered by Agency Staff.

With my objectives I focused heavily on the values of the company while ensuring it had long term benefits for both staff and the business. I wanted to ensure they were able to benefit one another through these. I also wanted to ensure that we were able to use these as promotional items for the company as most people do not have a very good outlook overall on the Logistics Sector, so giving these benefits and showing the organisations commitment to the environment was a very important factor as they benefit staff and give the company good marketing materials and overall good press. I then tied these in with my deliverables of the project. Making it clear for everyone to see the intent of this project.

## Risk Management

I selected the risks I did through looking at the KPI data and overall data on the logistics industry, I chose items that were in some cases very likely to happen and also low risk items as they are still risks to the project. Find below my reasonings for each.

### Risk 1 – Bankruptcy.

While I put this as a high priority risk, the chance of it happening is quite low, as an already established business, unless we face some major issues in the coming months the chance of bankruptcy is low, I even budgeted this project to reflect this, I only did what I saw as necessary and spent less than half the budget. This allows space for future improvements and opportunities to correct issues in the short term.

### Risk 2 – Failure of The Contact

This again was a high priority risk as it would have a major impact on the company, but I have classified it as a medium level eventuality, I came to this conclusion due to the logistics industry being very competitive and hostile in terms on contracts and other items, but I believe if we keep a strong communication network with the new supplier and updating them on this project shows a strong statement of intent for our future with them.

### Risk 3 – Loss of Support

While loss of support of this project would completely stop it, I saw this as having a lower impact than loss of the company as a whole or the contract, as I believe this Project has a strong backing and I have justified my reasoning for all items well and they fit with the companies' core values, making the directors more likely to be on-board with this.

### Risk 4 – Loss Of Staff

While losing our valuable staff would be very costly for the company, the measures I have put in place will hopefully prevent this from happening as we now offer one of the best, if not the best employee benefits packages in the industry and I have given staff an opportunity to input into the company through implementing Kaizen as we look to train our staff to higher levels and give them opportunities to advance, this should hopefully keep them on-board with us and should also make them want to work.

### Risk 5 – Failure to Implement WMS

I put this risk as a lower priority as we already have the procedures in place to work without it, but the WMS is the future of this company and with the relationship I hope to build with Oracle, if we face any issues with it we can hopefully work with them to resolve them.

### Risk 6 – Solar Panel Breakdown

This is an incredibly low priority risk with a high chance of happening as solar energy relies on one thing – the sun. But Solar Panels are known to have teething issues so we should expect to have some issues at the start, but hopefully we can mitigate them in the long run.

## Conclusion

In conclusion, I have given us a healthy timescale to implement these in, with plenty of time for development and feedback, this solution should ensure the long term health and growth of Truck Chief and ensure that us and our partners have long and prosperous relationships. This is simply just the start of what this company can achieve and I hope to have put the infrastructure in place so that we can achieve this.

## Task 1.4 Presentation

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	1.4 Presentation
<b>Evidence title / description</b>	Presentation
<b>Date submitted by candidate</b>	DD/MM/YY

# Truck Chief UK Ltd

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PROJECT SOLUTION PRESENTATION

# What is our solution?



Deliverables	
Deliverable	Description
Warehouse Management System	Allows staff to keep track of activities within the warehouse and streamline processes, reducing wasted time by up to 80% allowing for a lower workload on staff.
Solar Energy	Creates a more sustainable and allows for lower overall running costs of the warehouse, opens us up to more staff recruitment as staff look for greener workplaces.
Employee Benefits Package	Allows staff to feel more welcome and prepared to work, leading to higher workflow and motivation.
Cardboard Disposal Method	Using the Bailer we can sell Cardboard for around £60 per tonne depending on amount and who we are selling too it also clears wasted space on the shelving.



# Warehouse Management System

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- Use of Oracle NetSuite/Logistics– Building relationships and smooth integration
- CRM Integration– Allowing for the best customer experience possible
- Efficiency Benefits - Saves up to 80% of wasted staff time- Looking for items, etc.
- Worker Benefits– Allows for a streamlined work experience and reduces workload
- Customer Benefits– Allows products to be delivered quicker with a much more detailed experience



# Use Of Solar Energy

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- Less operational costings – 50% of energy used in operations will come from solar
- Marketing Value – Shows we as a company are mindful of the climate
- Environmental Value – Will reduce the companies carbon footprint by 20%

Pre-Solar Emissions Breakdown



# Employee Benefits

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- Creates a happier workforce– Staff feel they are valued and cared for the in the company
- Reduces staff turnover– Staff feel safer as they have precautions in place to lower risk of injury
- Promotes the company– The logistics sector is known for its poor conditions and lack of ethics
- USP in recruitment– With 65% of staff leaving the logistics sector within 12 months of joining– this will make us more likely to attract staff



# Cardboard Disposal

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- Creates more room in the warehouse – leaving more room for stock
- Reduces risk of Health and Safety Incidents – with 222 out of 100,000 staff being injured in a workplace accident – taking precautions is necessary
- Creates more revenue for the company – this should pay for itself within 2 years of operation with cardboard bails selling for around £60 a tonne



# Short Term Impacts

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- Major increase in workflow
- Happier and more active staff
- Slight areas of downtime (made up for in the long term)
- Investment into the future
- More working area
- Higher efficiency and more satisfied customers

# Long Term Impacts

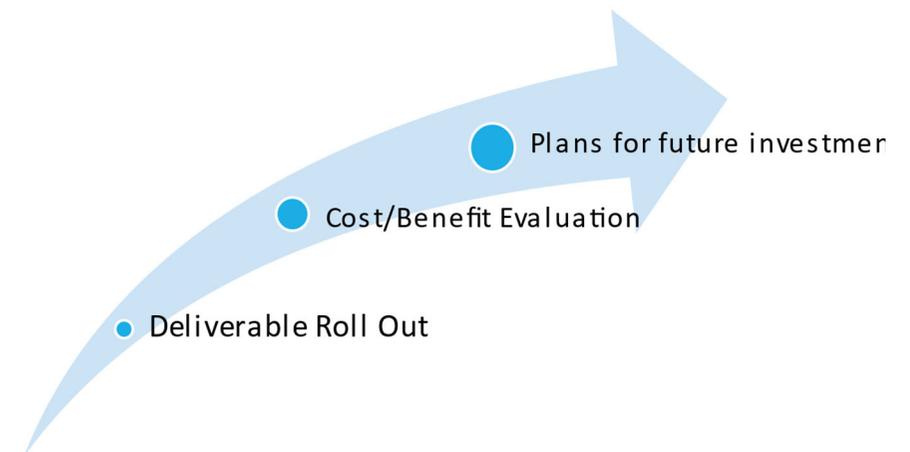
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- Ability to develop new systems with automation
- More long term staff
- Higher profit margins
- USP's to attract clients
- Higher volume of products
- Long term customers who receive great service, every time

# Budgeting

<b>Total budget</b>	<b>£450,000</b>
<b>Budget breakdown</b>	Costs
<b>Oracle NetSuite/Logistics WMS and CRM</b>	£48,432 per year
<b>Technology needed alongside WMS</b>	£20,000 (Estimated)
<b>Cardboard Bailer</b>	£42,018
<b>Sale of Cardboard</b>	(£21,900) (1 tonne a day estimated)
<b>Refresher Training Cost</b>	£100 per staff member (time and staffing cost)
<b>Solar Panels</b>	£12,500
<b>Employee Benefits Package</b>	£75 an hour (2 offered per year with an estimated 50 employees)
<b>Relief Fund</b>	£50,000 (To be used in any areas where necessary)
<b>Budget Remaining</b>	(£286,499,88) (Returned to finance department)

**Total Spend - £163,500.12**



# Communication

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## Communication Is Key

- Ensuring people internally hear it first
- Keeping suppliers in the loop to continue to build trust
- Ensure customers are aware of changes
- Being open and honest
- What communication form fits who and why?

Communication Plan			
Person(s)	Priority	Requirements	Contact Forms
Board Of Directors	10	Up to date information In-depth summaries	Phone, Email, Meetings and face to face
Upper Management	8	Status of project Any effects on operation	Face to Face, Email and Phone
Staffing	7	Updates on project	Staff Newsletter and face to face
Suppliers	7	Updates on project Benefits to them	Conferences, emails and phone calls
Customers	5	How new systems effect their experience	Emails and enquiries
Local Community	3	How this benefits the local community	Bullitins and Newsletters

# How?

- Progress Reviews – KPI Comparison – future data analysis
- Testing – Allows us to evaluate before roll out
- Audits – Ensure we are conforming to regulation
- Surveys – Direct information from key stakeholders
- Kaizen – Continuous Improvement allowing issues to be resolved by those who mainly use systems
- Reviews – Overview of changes and brainstorming

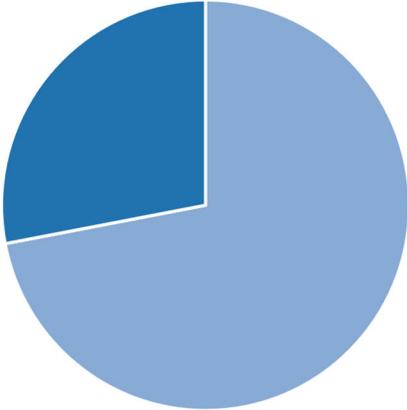
Week Commencing	24/04/23	01/05/23	08/05/23	15/05/23	22/05/23	29/05/23	05/06/23	12/06/23	19/06/23	26/06/23	03/07/23	10/07/23	17/07/23	24/07/23	31/07/23	07/08/23	14/08/23	21/08/23	28/08/23	04/09/23	11/09/23	18/09/23	25/09/23	02/10/23	09/10/23	16/10/23	23/10/23	30/10/23	06/11/23	
Surveys			Survey 1										Survey 2										Survey 3							
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Benefits Roll Out	Initial Roll Out														Review															
Bailer Install/Trials				Install	Trial						Review																			
Internal Audits											Audit 1												Audit 2							
External Audits																														External Audit
Kaizen Days								Kaizen 1				Kaizen 2				Kaizen 3							Kaizen 4							Kaizen 5
Progress Review									Review 1																				Review 3	

Final Changes Pending External Audit

# Storage

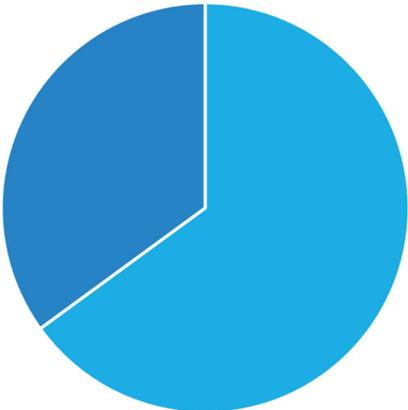
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Capacity PreChanges



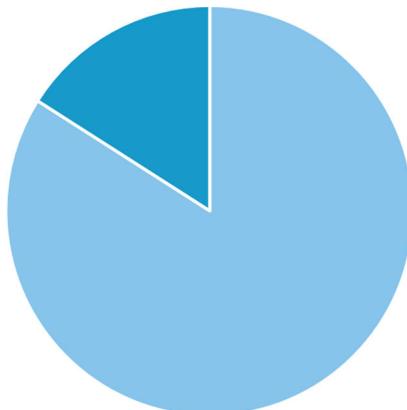
■ Used Space ■ Available Space

Capacity PostChanges



■ Used Space ■ Available Space

Capacity With Contract



■ Used Space ■ Available Space



# Values

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## Exceeding Customer Expectations–

- Use of CRM systems to ensure customers are able to receive the best service
- Use of WMS ensures quickest dispatch of products possible

## Valuing people and teamwork–

- Workforce benefits package to show our appreciation
- WMS will allow for more collaboration and less wasted time

## Sustainability–

- Solar Panels will allow for a massive drop in our carbon footprint showing our commitment
- The recycling of cardboard to ensure it is disposed of or repurposed correctly

## Working Safely–

- Less chance of accident due to decreased clutter in working areas
- Staff have access to services like Physiotherapy to ensure they are in good physical condition to work

# Thank you for listening

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Any Questions?

## Employer-Set Project – Presentation Observation Record (Task 1.4)

8715-30 T Level Technical Qualification in Management and Administration

8715-033 Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234
<b>Date</b>	DD/MM/YY

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds Provider No.</b>	999999a

Record observation notes below to inform external marking. Notes must be detailed, accurate and differentiating. They should identify areas of strength and weakness to distinguish different levels of performance quality for each of the prompts below. Notes do not need to duplicate information that will be seen by markers in other evidence submitted for the task, eg presentation slides, instead they should focus on things that are observed.

### Evidence of core knowledge and skills being applied to the brief

- The candidate provides evidence of how the objectives outlined in the business case have been met using evidence detailed in project planning which focused on meeting the organisation's current needs and future aims. The candidate provides evidence of why this solution meets all of the objectives outlined in the business case.
- Evidence of core knowledge and skills is applied and evident comprehensively through the presented content and in response to questions asked. The candidate refers to sustainability as a core value and the importance of CSR in reference to the marketing value, also detailing how the use of solar energy will replace other methods of energy consumption by 50% and the companies carbon footprint by 20%.
- Business and commercial awareness is demonstrated regarding research outcomes from PESTLE including NHS statistics and reference to the logistics sector.
- Excellent recall of data for example surrounding cardboard selling for 60 pounds per ton from the task brief when explaining the use of a cardboard bailer.
- The candidate links previous points to the short term impact and communicates the efficiency of using the proposed systems as opposed to existing manpower.
- Reference is made to change Management Principles such as the importance of keeping customers informed and transparency within communications. In particular transparency regarding how changes might impact the customer experience negatively in the short term but communicating the longer term benefits and why this is occurring.

- Project Management tools such as the Gantt chart are embedded and referred to, to inform and provide a visual to the audience. The deliverables are also discussed and references made to evidence based practice informing the audience that some of the efficiencies will include 80% less wastage by using the new proposed system, that employees are looking for greener workplaces and how the deliverables link with the companys core values.
- Quality Management tools are referred to such as internal and external audits, testing, surveys and continuous improvement methodologies such as Kaizen to instil confidence in the project outcomes being delivered. Within the gantt chart time is scheduled for these tasks.
- Expected impacts of the chosen solutions, both short and long term are discussed. Short term benefits include an increase in workflow, happier and engaged staff, investments in the future, an increased working area with increased efficiencies, higher profit margins and satisfied customers. The candidate then discusses the long term benefits such as opportunities of using AI and automated processes in the future and how staff retention will be increased with less reliance on agency staff, resulting in higher profit margins.
- Stakeholder interests are considered within the proposed solution for example the improvements to the customer experience from implementing a CRM system by improving communications via regular updates and quicker dispatch and also to the workforce resulting in less absenteeism and a safer workspace. An excellent use of data regarding the lack of dental provision within the UK currently and how staff benefits can offer this to reduce stresses on staff and use as a USP when recruiting.
- Reference is made to each of the key stakeholders using the communications plan.
- Budgeting explained – Clear detailing of how it will be spent and remainder to invest.

### Presentation technique and use of technical language

- The candidate presents confidently with clear eye contact, engaging with the audience and speaking freely. A well-rehearsed presentation.
- The candidate is confident and persuasive in his approach to the Operations Director, detailing why it should be implemented and really immerses himself in the scenario.
- There is a brief moment where there is a delay in the slides transitioning, The candidate is calm and professional when addressing the audience.

## Communication with the audience

- Clear and confident, positive body language with great variation in tone and use of hand gestures.
- Although The candidate provides a clear and professional introduction, there is an opportunity to consider the audience and provide a longer introduction detailing what the presentation will entail.
- Evidence of effective communication and information skills in the presentation tailored to the audience in line with the business need and project brief, with a logical structure.
- The communications plan is clear and well communicated to the audience and the deliverables are detailed from the project plan which are then discussed in terms of how they are to be achieved.
- He discusses partnering with the technology company and the synergistic benefits this will provide. For example being made aware of new technological advancements to support the company.
- A logical approach taken within the delivery of the presentation. For example The candidate refers to the rationale, includes the Gantt chart to visualise scheduling and discusses the use of audits, surveys and kaizen to ensure quality in delivering the proposed solution.
- Closure of presentation refers back to company values and how each deliverable aligns with these.

## Use of digital skills

- Evidence of effective visual communication through the use of digital aids such as slides. The Pre solar emissions breakdown is an example of a particularly good use of visuals – particularly storage – used space and visual space.
- The candidate utilises transitions to engage the audience and confidently uses the smart board to remain central to the presentation being delivered.

Tutor questions to candidate	Candidate responses
What approach did you take to planning, and can you explain why?	When it came to planning, wanted to keep certain points in mind for example core values to ensure they are integrated and staff work towards these within the project.
Do you believe there are any risks to the business with the approach that you have considered?	The risks are very small and can always go back to old system but the major risk is the warehouse management system but not huge risk. If need to can fall back on safety precautions in place for example with the solar panels these are still fairly new as an invention and so might have some teething problems but have a fall back on the main energy grid and ensuring there is a fall back in place.
You outlined briefly how your proposed solution meets the aims of the brief. Can you tell me the reasons why you think the proposal is best suited to meets those aims?	The main 2 things we focused on were efficiency and cost benefits to the company to give the largest overall profit but also considered staff as didn't want to have an unhappy or unsafe working environment and took some liberties with the money whilst also working within the budget, spending less than half, providing a safety net.

**Any other aspects**

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**Tutor signature**

**Date**

x \_\_\_\_\_

DD/MM/YY

If completing electronically, double click next to the 'X' to add an electronic signature once the record is **finalised**.

## Task 2.1 Collaborative Problem Solving

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	2.1 Collaborative Problem Solving
<b>Evidence title / description</b>	(i) Operations Director Email (ii) Briefing note
<b>Date submitted by candidate</b>	DD/MM/YY

(i) Operations Director Email

<b>To:</b>	<b>operations@truckchief.uk</b>
<b>Subject:</b>	<b>Forklift Keys Findings/Solution</b>
<b>CC:</b>	<b>finance@truckchief.uk, projects@truckchief.uk, purchasing@truckchief.uk</b>



Good Afternoon,

Thank you for making us aware of the on-going situation within the warehouse regarding forklift trucks, we have kept it as our top priority from the moment you put it forward to us.

After much consideration and deliberation we believe we have found the correct way to rectify and prevent the ongoing issue with the forklift keys. Please find the details outlined below.

Prevention –

Staff will sign into a contract giving them responsibility over their keys and will be responsible for 50% of the cost if lost while in their keeping, this gives staff more responsibility making them feel they have our trust and will also reduce our costs if lost, they have the opportunity to opt out of this by relinquishing their operator's licence.

A key sign-out system will be implemented allowing us to keep track of who had the keys in their care last – therefore giving them responsibility over the item.

Short Term Solutions –

In the short term we will look to replace the keys on a payment plan with our supplier, Speedit Trucks. This will be taken out of the companies' petty cash fund. We will also look to get a reduction in price for the keys due to our already strong relationship with them with promises of future business with them being included in this. (See Long Term Plan)

Alongside the key sign out systems, the keys will be placed on colourful lanyards, this makes them more visible and gives the key more surface area, making it harder to lose and if they are lost, easier to find.

Long Term Plan –

In the long term we will look to remove keys entirely from our next set of forklifts, we plan to work with Speedit on this new system, which will allow staff to access forklifts via their access passes rather than physical keys. As staff need these passes to clock in and out they will be much more careful with them creating less losses and overall issues as the forklifts can still be used. We are putting this forward to our project team, so they are able to begin work on this.

I hope you find these solutions to be up to the companies standards and that they will hopefully resolve our on-going KPI issues and allow us to get back to giving our very best customer experience, I will shortly put out a Briefing Note to the staff to inform them of these up-coming changes.

I wish you the very best and hope to see you soon.

With Regards,

Zak Alton.

Project Co-Ordination Team, Truck Chief UK Ltd.

(i) Briefing Note

Greetings,

It has recently come to our attention the fact that we are currently missing a significant number of our Forklift Keys, we understand this has caused issues as your roles have become much more strenuous due to this, this is more than clear to us as a significant number of our KPI's have been effected.

We urge staff to check on their person and in their home to see if they have accidentally taken home a set of these keys, if so please return them immediately, there will be no questions asked and no punishment if you do this as we simply just need them back.

To mitigate this from occurring in the future, we will be implementing new processes with the forklift keys, keys will now have to be signed for within the warehouse office before being taken and will be kept on a lanyard for their safe keeping, while not within the ignition of the forklift, these must be kept always clipped to you to ensure they are not accidentally misplaced. By signing them out you are agreeing you are responsible for 50% of the cost of those keys if they go missing during the time they are signed out in your name if you are not willing to do this, unfortunately you will be stripped of your forklift operations licence to be used within the workplace.

In the future we will look to remove keys from forklifts entirely to make your lives easier and more efficient. We hope to do this by using our identification cards you use to access doors around the building and clock in and out with. But until then, please ensure keys are looked after.

Please let us know if you have any further ideas or queries about and around this matter and we will be more than happy to listen.

All the best,

Truck Chief UK Ltd Management.

# Employer-Set Project – Collaborative Problem Solving Observation Record (Task 2.1)

8715-30 T Level Technical Qualification in Management and Administration

8715-033 Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234
<b>Date</b>	DD/MM/YY

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds Provider No.</b>	999999a

Record observation notes below to inform external marking. Notes must be detailed, accurate and differentiating. They should identify areas of strength and weakness to distinguish different levels of performance quality for each of the prompts below.

## Communication skills.

- Firstly, the candidate confidently communicated with the other members of the group through use of volume, tone and pace of speech. This can be clearly seen in the recording as the candidate is always heard clearly. Gaps within the meeting to take notes remained short and thus did not disrupt the flow of the conversations.
- While the candidates body language appeared nervous at first, as the conversation went on the candidate adopted more open positive body language throughout and maintained regular eye contact for the discussion.
- Additionally, the candidate demonstrated excellent listening skills throughout and respectfully allowed the other members time and opportunity to speak. This was done through constantly asking a mix of open and probing questions and allowing time for them to express their ideas.
- Overall, the candidate did an excellent job of bringing others in, and ensuring their points were being listened too through their body language and comments.
- Finally, the candidate remained professional in the language they used and constantly utilised technical vocabulary where appropriate.

## Collaboration/contribution to discussion.

- All candidates took a methodical approach to the discussion and began by creating an agenda. However, at times the conversation did deviate from the initial agreed structure. While this did disrupt the flow of the discussion, it was a unique approach and allowed all nuances of points to be considered.
- Ultimately, the candidate took the lead in the group. They regularly contributed to the group and steered the conversations. Their contributions were insightful, and all points made were backed up with evidence. While at times their ideas could have been more detailed and specific, the basic premises of their ideas were put across in an understandable way.
- Importantly, the candidate critically supported and challenged the ideas of others, which added to the quality of the discussion and the overall final solution. The candidate ensured all ideas had been considered from the perspective of all stakeholders, which increased the effectiveness of the final solution.

- Moreover, the challenges made by the candidate were made in a professional manner and ensured no conflict arose within the discussion.
- Occasionally, this group did have the tendency to talk over one another which limited the quality of some suggestions, but this did not damage the overall group chemistry and their ability to decide on a solution.

### Ideas to solve problem / advantages and disadvantages.

- **Technical accuracy**
- **Application of core knowledge and core skills**

### Issue and Impacts

- The candidate understood and discussed the issue in depth. Candidates all agreed that the primary issue was the loss of forklifts from operations due to the missing keys.
- **Impact on productivity** - A significant impact of this was identified as the damage to productivity within the warehouse. Candidates noted the vital role forklifts play within the warehouse and in improving productivity. The whole group raised the issue of the organisation being able to meet current demand and prevent them taking on new contracts in the future.
- **Communication issue** - Candidates also critically noticed how the number of missing keys and how many forklifts this impacted seemed unclear within the brief and highlighted how this reflected muddled communication channels. This needed addressing in their solution.
- **Impact on ability to uphold core values** - Candidates also noted how the impact on productivity and KPIs meant Truck Chief could not uphold their core values, especially in the case of customer satisfaction, due to the inevitable delay in processing orders because of inoperative forklifts. Similarly, candidates noted how this attitude to lost keys did not reflect well on their “sustainability” value, as it represented a worrying attitude to waste.
- **Rising costs** - Finally, candidates noted how this attitude to waste would also impact the organisations' ability to make profit due to the rising costs of replacing keys, citing the £500 price in the process.

All candidates supported each other in detailing and clarifying different aspects of each other's solutions. The ones detailed below are the main solutions proposed by the individual candidate, as well as the advantages and disadvantages suggested.

### Solutions

**Solution:** Investigate the potential of changing the ignition process on forklifts, moving from keys to an employee badge and button system. Employees would use the badge to enter the forklift where keys would always remain.

**Advantages:** Employees will take extra responsibility with equipment as centralised system will show who forklift operators are at specific times, as well ensuring they do not lose badges due to them being required for access to the forklift.

**Disadvantages:** Financial cost of replacing ignition system on forklift will be high and it would be wiser to wait till forklifts need replacing, otherwise this could be another case of excess waste and reflect poorly on the organisations values. As a result, this is much more of a long-term solution than a quick fix. Also, meeting with Speed IT would still be required to ensure technology was available and they were willing to replace them.

**Solution:** Hold a meeting with Speedit to discuss the replacement of keys, using positive relationship and future orders to advantage. Contracting out forklift hire to them moving forward in exchange for replacement of current keys.

**Advantages:** Fixes the issues of missing keys currently which resolves the issues discussed in the initial part of the meeting. This addresses the issue in the short term, while remaining a low-cost solution (short-term) and means logistic budget does not need to be utilised.

**Disadvantages:** Does required future commitment to Speedit Trucks through the contracting out of future forklift purchases.

**Solution:** Communicate with shift managers regarding the responsibility of keys moving forward and how future loss will result in punishment, which is to be included in future employment contracts.

Simultaneously, contact staff directly to encourage them to look for missing keys, including offering a reward for staff who come forward with missing keys.

**Advantages:** Honesty with employees and incentive of reward may encourage staff to come forward with missing keys, solving the issue altogether. Also, an incredibly low costs and simple solution.

**Disadvantages:** No guarantee this will work or that staff have the keys in the first place. Inclusion in staff contract is a heavy responsibility to place on staff, and as a result could encourage them to focus on monitoring keys more so than actual responsibilities of role. Additional pressure could also damage moral and damage productivity in the process.

### **Agreed Final Solution**

- Candidates agreed that due to the scale of the issue, the issue will require a project of itself moving forward, in which a variety of solutions and changes need to be managed. This is particularly the case with the solutions reliance on employee cooperation. Therefore, communication and change management need to be significantly considered when implementing a solution. As part of this project the following issues will be addressed:
- **Key tracking and storage** – Keys will be colour coordinated to selected forklifts. This will improve understanding and communication around any missing keys and inoperative forklifts, improving productivity. Employees will also be encouraged to attach keys to lanyards to support with storage of them. Keys will be stored in a central location and logged out and in by employees when in use.
- **Contract changes** – New employees and renewing current employees will have contractual obligation which outlines their responsibility in key management and outlines the consequences if they fail to do so.
- **Payment plan option** – Directors will liaise with finance department and Speedit trucks to arrange a payment plan for immediately replacing missing keys. This will alleviate impact on budget and resolve the current issue of loss of forklifts.
- **Replacement of key ignition system** – Long term, Truck Chief should look to replace the ignition system on forklifts to a lanyard system. This is to be achieved when the organisation is replacing the current fleet and going electric. This will eliminate this issue altogether and meet their core value of sustainability. This is dependent on supplier relationship so directors should concentrate efforts on maintaining this moving forward
- To communicate the change, a variety of methods need to be employed including meetings, emails, and daily briefs. Within these, the directors and managers need to be empathetic but stress the importance of key management to the success of the business, particularly the financial element. Communication should also be extended to customers given the recent rise in customer complaints and placement in the high fashion industry.
- Future research should also be conducted by the team into the potential of tracking devices. While directors would need to discuss the ethical and sustainability issues of this technology, this could be a long-term ultimate fix to missing keys moving forward.

The meeting concluded with a discussion of next actions and a summary of talking points.

**Any other aspects**

Students were given a 5-minute warning through a hand signal at the 25-minute mark, this was made clear to them beforehand to prevent disruption of flow.

**Tutor questions to candidate****Candidate responses**

N/A

N/A

**Tutor signature****Date**

x \_\_\_\_\_

DD/MM/YY

If completing electronically, double click next to the 'X' to add an electronic signature once the record is **finalised**.

## Task 2.2 Evaluation

<b>Assessment number (eg 1234-033)</b>	8715-033
<b>Assessment title</b>	Employer-Set Project

<b>Candidate name</b>	<first name> <surname>
<b>City &amp; Guilds candidate No.</b>	ABC1234

<b>Provider name</b>	<provider name>
<b>City &amp; Guilds provider No.</b>	999999a

<b>Task(s)</b>	2.2 Evaluation
<b>Evidence title / description</b>	Evaluation
<b>Date submitted by candidate</b>	DD/MM/YY

## (i) Evaluation

### Introduction

During this project, I have worked to find the very best solution for Truck Chief UK Ltd. I personally have learned a lot about the logistics industry and have gained valuable knowledge that I will bring forward with me into the future. During this project I set myself a goal of working with the company's best interests in mind, for this I considered the objectives set by the directors of continuous improvement and increased efficiency. Alongside this I kept the company's core values in mind with everything I did, making sure all solutions linked to them as much as I possibly could.

### Investigation

During the allocated research time I ensured that I found the most cost effective and efficient solutions I could, doing a deep dive into all things to do with logistics, delving into case studies, analysing data and looking at news stories to ensure that this project would not lead to any of the short coming's others faced. I looked at what the organisation wanted to achieve and developed my aims and objectives off that, using these I was then able to set in place my deliverables.

### Outcome Achievement

When considering my deliverables I kept in mind three main things, cost, benefit, and task at hand. Ensuring that my deliverables conformed to these was paramount to their success. I kept costs as low as possible while achieving as much as spending less than half the budget and made sure all parties involved were benefited. I decided to go with my deliverables as this amount was very achievable within the budget set and these four would work hand in hand to go above and beyond the expected outcomes of this project.

### Improvements and Changes

While I do standby my statement above, nothing is perfect, there are always areas that we can improve upon and better ourselves with, while I have learnt a lot during this project there is still more depth I could go into, I personally believe if I had more time I could have dug a bit deeper and possibly could find other solutions that may have more areas of benefit for the organisation and that could possibly achieve the outcome with a lesser number of deliverables. If I was to do the project again I would also look into how I set the information within my PID and POAP. I personally believe I could have made these documents clearer and easier to navigate.

### Plan-on-a-page

For this project a plan-on-a-page is the best solution, this is simply since the logistics industry is very fast paced and giving information on an easily readable and clear page would be better than that of a regular project plan. This is not the case in all circumstances though, I believe that having both available would benefit the project massively as it tailors to two different types of people. Some people do like to be more thorough in their work and the level of detail in a plan-on-a-page compared to that of a project plan may not give them this. But in the sector we are delivering this in, I believe a plan-on-a-page is more suited for most people within it.

### Meeting the requirements

Overall, I do believe my project and proposed solution for Truck Chief UK Ltd met the requirements of the brief and in some areas went above and beyond what was expected of this. Throughout this project I have spent time reflecting on my work and ensuring that everything I do works to achieve the requirements set by the brief and meets the organisations core values alongside that. I personally believe that ensuring these two-work hand in hand is vital to the project's success as you would think the organisation would not want a project that does not achieve its goals to work to the company's values or a project that works to its goals but does not achieve its values. As these are both key points within the project brief. Another focus I had during the process of this project was the KPI data that was given to us, I tried to look to improve upon

this with my solutions, looking into areas such as agency worker costings, health and safety and staff training and wellbeing.

### Presentation

During my presentation my focus was portraying facts to the operations director, showing how my solutions would benefit the company in both the long and short term. To do this I put forward in depth findings and knowledge about my deliverables and statistics to support these. While we did have a slight technical hiccup during the presentation I remained calm and stayed on task, rectifying the issue swiftly with little interruption to it. In the remainder of the presentation I remained professional and demonstrated my ability to adapt while also continuing to put across my points. If I were to do my presentation again I would look to condense my information onto less slides allowing for them to add more value to my speaking.

### Collaborative Problem-Solving Activity

I personally believe our group discussion was one of the best parts of this project, as a group we communicated well and professionally, allowed each other to put forward our points and gave constructive feedback that allowed us all to agree on both a short term and long-term solution to the issue faced. We decided for me to take the lead on the discussion, setting points of discussion and introducing topics. I was very fair and let everyone have their say and discuss before moving on, I ensured that the group was very democratic and that we all agreed on ideas before deciding they were a part of our solution. This created a very productive and efficient working environment during this discussion that allowed us to be very constructive.

### Conclusion

In conclusion, I believe that this project would be a great solution for Truck Chief UK Ltd as it has major benefits in the short term and gives great opportunities for long term growth allowing for an easier transition into areas such as automatic warehousing and integration of AI, I have really enjoyed getting to know more about the logistics sector and developing ideas that I personally believe would benefit it. While I know there is room for improvement within this project I believe I have done the best I can in the allotted time and have been very thorough and attentive to detail while doing research and in my proposal. I have ensured to meet all the aims of the project and achieve the company's values throughout the project and have given them my absolute best work and the best outcomes I could find using the information given to me.

## Get in touch

The City & Guilds Quality team are here to answer any queries you may have regarding your T Level Technical Qualification delivery.

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