



**SUCCESSION
TRAINING**

BSB51415 Diploma of Project Management



Integration Management

Version 1.01 Produced 18 October 2018

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Version control & document history

Date	Summary of modifications made	Version
5 May 2016	Version 1.0 produced following assessment validation.	1.0
18 October 2018	Version 1.01 Change to Practical Assessment	1.01

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ASSESSMENT WORKBOOK COVERSHEET

WORKBOOK:	Workbook 5
TITLE:	Integration Management
FIRST AND SURNAME:	Lauren Symonds
PHONE:	0450 672 928
EMAIL:	Laurenesymonds@gmail.com

Please read the Candidate Declaration below and if you agree to the terms of the declaration sign and date in the space provided.

By submitting this work, I declare that:

- I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time.
- I am aware that there is a limit to the number of submissions that I can make for each assessment and I am submitting all documents required to complete this Assessment Workbook.
- I have organised and named the files I am submitting according to the instructions provided and I am aware that my assessor will not assess work that cannot be clearly identified and may request the work be resubmitted according to the correct process.
- This work is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of a qualification or statement of attainment.
- I am aware that there is a policy of checking the validity of qualifications that I submit as evidence as well as the qualifications/evidence of parties who verify my performance or observable skills. I give my consent to contact these parties for verification purposes.

Name : Lauren Symonds

Signature: L
Symonds

Date: 17.10.20

CASE STUDY

Instructions to Student

These case studies are hypothetical situations which will not require you to have access to a workplace, although your past and present workplace experiences may help with the responses you provide. You will be expected to encounter similar situations to these in future as you work in a project team environment.

In the real world you are likely to encounter the situation where you enter a project, taking over from another project manager. The documentation that is handed over to you is not necessarily up to scratch, and there could be serious issues with the project. This assessment captures that real life scenario.

The case studies are the first part of dealing with “multiple complex projects” required in all the units of this subject. The other assessment covering this requirement is the practical assessment. When you have completed the case studies you will be able to commence the practical assessment which covers the generic skills needed to function as an effective project team member. This assessment on the other hand covers the application of the underpinning knowledge and background theory.

Introduction

You have been appointed as a project management consultant advisor to the project team at Awesome Landscapes Pty Ltd. Specifically you are required to provide independent advice on seeing their current project through the entire life cycle.

You have already provided advice to them in the previous four workbooks.

The project manager has advised the project is now complete, and is about to archive all the project documentation.

Your task is to evaluate the supplied project documentation and to ensure all due diligence has been completed.

You will need to compare the project plan with the previous version to ensure it is ready for closure.

[Project Charter version 4 \(.pdf\)](#)

[Project Plan version 4 \(.pdf\)](#)

[Project Gantt Chart version 4 \(.mpp\)](#)

[Project Gantt Chart version 4 \(.pdf\)](#)

[Project Network Diagram version 4 \(.pdf\)](#)

(username: cstclearner password: CstcPty@123)

Note: These documents were generated in year 2016. For the purpose of this assessment, refer to ‘2016’ as the current year and ‘2017’ as the succeeding year.

1. Sam has asked to you check the Project Plan for anything that is missing. He has been very busy but appears to have done all the necessary finalisation of the plan ready for sign off.

He has mentioned the final report or lessons learnt documentation has not been included, and the project archiving checklist have not been completed either. You will be assigned to complete these later.

Examine the Project Charter (version 4) and Project Plan (version 4) and identify four (4) things that are missing.

Guidance:

- a. Assume the Project Gantt Chart and the financial figures in the summary/detailed costing tables are up to date as these have already been audited. Also remember this final project plan is in draft, and will not be signed off until the final acceptance meeting in a few days' time.
 - b. Take note of the following:
 - i. Version control.
 - ii. The updates from the project in the other workbooks you have completed in previous workbooks.
 - iii. Check the project archiving checklist for everything that should be included
- a. Project Charter & plan to have the new contractor in stakeholders and resources updated / highlighted to show change in blue as per change request 3.
 - b. Update Network Diagram to be 100% completed
 - c. Issues Register is blank, this needs to be updated to include problems that had happened, such as the damage from neglect whilst the project was on hold.
 - d. Project Cashflow updated to show final figures

2. Sam is in the process of developing a set of Lessons Learnt Documentation for the project.
 - a. Access and review the four (4) previous workbooks you have completed and derive three (3) different lessons learnt throughout the project.
 - b. Document each lessons learnt using the Lessons Learnt Documentation Template provided. Use one template for each lessons learnt.

Lessons Learnt Documentation Template 1

Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Lauren Symonds
Date	17/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	1
Lesson Learned Proposed Name:	Cash Flow
Project Team Role:	Administration
Process Group*	
☒ Initiating ☐ Planning ☐ Executing ☐ Controlling ☐ Closing	
Specific project management process being used:	
PMBOK methodology	
Specific practice, tool or technique being used:	
Planning	
What action was undertaken?	The Cash Flow did not cover the costs for each phase of the project appropriately
What was the result?	The Surplus for the project needed to be used to accommodate costs.
What might have been a more preferred result?	The cashflow of the project to have allowed enough funding in each phase that had a more flexible reach.
What might have created the more preferred result?	The Cash Flow to have been planned more appropriately to allow for funds to cover all costs in each phase of the project.

What is the specific lesson learnt?	
The budgeting for each phase of the project to be planned out to have all costs and potential costs from changes be covered, without having to rely on the surplus funds.	
How could one identify a similar situation in the future?	
When planning for any future project that has multiple phases that require financial planning to procure materials or labour.	
What behaviour is recommended for the future?	
Review the current cash flow for this project, as well as other cash flow budgets and identify how much funding was required for each phase, and plan for any future projects of a similar nature with the budget from past examples to allow for appropriate cash flow.	
Where and how can this knowledge be used later in this current project?	
This can be applied to the current project by reviewing the current Cash Flow and recognizing how the funds should have been allocated by comparing the actual cash flow with the projected Cash Flow.	
Who should be informed about this Lesson Learnt:	
☒ Executive(s)	☒ Project Manager(s)
☐ Others	☐ Project team (s) ☐ All staff
How should this Lesson Learnt be disseminated?	
☒ E-mail	☐ Intranet/Web site ☒ Tip Sheet/FAQ ☒ Library
☐ Others	

Lessons Learnt Documentation Template 2	
Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Lauren Symonds
Date	17/04/17
Project Manager	Sam NG
Lessons Learnt Number	3
Lesson Learned Proposed Name:	Incomplete contractor work

Project Team Role:		Earthworks and Excavation	
Process Group*			
☐ Initiating	☐ Planning	☒ Executing	☐ Controlling ☐ Closing
Specific project management process being used:			
PMBOK methodology			
Specific practice, tool or technique being used:			
Monitoring			
What action was undertaken?	J.P Digging did not receive payment for the work completed during phase 1 or for the work performed in phase 2		
What was the result?	J.P Digging has requested payment of invoiced work on the termination of their contract.		
What might have been a more preferred result?	That the contractor was to be paid in guidance with the contracts payment agreement.		
What might have created the more preferred result?	The invoicing to be monitored more closely so that the contractor is paid on time.		
What is the specific lesson learnt?			
Accounts need to be managed more efficiently to ensure payments have been made on time to all accounts / contractors.			
How could one identify a similar situation in the future?			
The regular documented data for invoicing is not being kept up to date			
What behaviour is recommended for the future?			
Monitor invoicing to ensure payments are being made on time.			
Where and how can this knowledge be used later in this current project?			
This can be applied for the current project on a fortnightly basis to monitor invoicing.			
Who should be informed about this Lesson Learnt:			
☐ Executive(s)	☐ Project Manager(s)	☐ Project team (s)	☒ All staff
☐ Others			
How should this Lesson Learnt be disseminated?			
☒ E-mail	☐ Intranet/Web site	☒ Tip Sheet/FAQ	☐ Library
☐ Others			

Lessons Learnt Documentation Template 3

Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Lauren Symonds
Date	17.04.17
Project Manager	Sam Ng
Lessons Learnt Number	2
Lesson Learned Proposed Name:	Additional Structures Added to Project
Project Team Role:	Earthworks and Excavation
Process Group* ☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing	
Specific project management process being used: PMBOK Methodology	
Specific practice, tool or technique being used: Project Planning - time constraints	
What action was undertaken?	Three retaining walls and services to additional units was included into the project.
What was the result?	Phase 1 of the project was started 7 days prior to the original planned start date and procurement of supplies. The amount of task hours had increased as a result to monitor and adhere to the changes. The excavation work has also increased during phase 2 which resulted in less lag time to keep the project on schedule.
What might have been a more preferred result?	The additional chalet units included in the initial planning stage to allow for additional time and budgeting.
What might have created the more preferred result?	An increase in more lag time allowed between tasks to compensate for delays on the project, such as in this instance where work had to start earlier and lag time decreased during phase 2, where it should have allowed for bad weather.
What is the specific lesson learnt? More lag time is required to allow for delays in the completion of tasks to keep within the planned project schedule.	
How could one identify a similar situation in the future? When planning a new project schedule.	

What behaviour is recommended for the future?			
Allow additional lag time and or days needed to complete tasks			
Where and how can this knowledge be used later in this current project?			
The current project can incorporate this knowledge by allowing additional time to complete the assesement of the project audits and reports.			
Who should be informed about this Lesson Learnt:			
☒	Executive(s)	☒	Project Manager(s)
☐	Others	☐	Project team (s)
☐		☐	All staff
How should this Lesson Learnt be disseminated?			
☒	E-mail	☐	Intranet/Web site
☐	Others	☒	Tip Sheet/FAQ
☐		☒	Library

3. Sam has asked you to write the final report for the project. Complete the final report using the template below, assuming the things missing from the project plan in the question above have been included.

Guidance:

- Access and carefully review the project documentation you were provided with along with the case study scenario and populate all the fields with the required information.
- Provide a date that is later than the last date in the Project Gantt Chart version 4.
- Assume that this report will be submitted to Terrence Mackay, Stephen Lyons, Kate Chan, and Kim Nguyen.
- Provide a brief summary of the project in terms of the four project constraints (Scope, Cost, Time, and Quality).
- Provide a detailed summary of the project covering the functions of project management listed below. Further guidance is provided for you within the template.

Project Name:	Cascade Peak Chalets Landscaping Project
Prepared by:	Lauren Symonds
Date:	17 April 2017
Project Summary	
Scope (What was included and excluded)	
Inclusions: Stage 1 –Pre-building Create access roads and retaining walls in preparation for the construction of the buildings. - Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3. - Access roads through the existing forest for builders to access each building site. - Retaining walls to provide stability around the buildings. Includes three additional retaining walls as per updated site plan Stage 2 –Building Support The monitoring and maintaining the access roads and retaining walls whilst the buildings are being constructed, plus the excavation of utility services (water and power supplies, septic system, etc.). Control any erosion control or other environmental issues that occur during the building construction - Monitoring the building site for erosion, subsidence or other environmental issues. - Excavation for incoming utilities (electric cable, water supply, etc.). - Excavation of sewerage and septic system. - Maintaining the plants removed in stage 1. Stage 3 –Planting and Landscaping. - Diversion of stream and creation of water channels through resort in between the chalets. - Conversion of most access roads into landscaped walking paths. - Erection of signage around resort. - Detailed landscaping around chalets and paths. - Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest. Refer Project Plan Version 4, page 17, and Project Charter Version 4 page 2.	

Exclusions

The milling and delivery of timber for the chalets, or the delivery of other materials used to build the chalets.

- Sourcing, purchasing or delivery of services (cables, drain pipes, etc.) for the services Awesome will be excavating as part of the project.
- Any scope not covered in the initial Council approved plans.

Stage 1- Prebuilding

- Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3
- Access roads through the existing forest for builders to access each building site.
- Retaining walls to provide stability around the buildings

Stage 2 Building Support

- Monitoring the building site for erosion, subsidence or other environmental issues.
- Excavation for incoming utilities (electric cable, water supply, etc.)
- Excavation of sewerage and septic system
- Maintaining the plants removed in stage 1

Stage 3 - Planting and Landscaping

- Diversion of stream and creation of water channels through resort in between the chalets.
- Conversion of most access roads into landscaped walking paths
- Erection of signage around resort.
- Detailed landscaping around chalets and paths
- Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest.

Cost (Budget vs. actual)

A fixed sum of \$550,000 was to be paid by the project sponsor. The project budget allowed a total of \$444,253.00.

This left a surplus/contingency of \$105,747.00 to absorb any extra cost the project would incur.

The actual amount paid to Awesome Landscapes, after changes made, was a total amount of \$650,000. The project Budget was adjusted to \$514,892. This value was updated throughout the project and was a contingency to get the project back on track and to fix damages while the project was on hold.

This left the project with a surplus contingency of \$135,108.00. All figures exclude GST.

In Phase 1, the expected cost was a total of \$229,868.00

Actual Pre-Building Phase Cost was \$247,768.00 in total. This was due to procurement costs increasing by \$6,500.

Phase 2

Expected cost was \$71,891.00

The actual cost was \$109,491.00

There was double the cost amount in procurement by \$34,000.00 and Labour requirements were increased to \$3,600.

In Phase 3

Expected total cost was \$142,494.00

Actual cost was \$157,633.00

While the Labour and Procurement remained the same, Purchase budget increased by \$15,139.00

If Awesome Landscapes hadn't received the additional funding of \$100,000.00 but kept to the original plan, the project would have only made \$59,239. In addition to this, the budget cashflow would not have covered the costs at each phase if there was no contingency to fall back on to.

Time (Estimate vs. Actual)

The project was originally scheduled to begin on 3rd August 2016, and end in 9 months time on the 11th March 2017.

Phase 1 was to commence on 3rd August and be completed by 21st September 2016.

Before the work began, a change request was put in place, and the project was required to start 7 days prior to this start date, on the 27th July 2016.

Actual Phase 1 completion was completed by 22nd September. At this stage the project was out by one day, including the additional time frame for the new retaining walls.

Initially, Phase 2 was to commence on 24th September through to 4th January 2017. This phase was started on time, and was completed on the 8th February 2017. Ownership of the project was transferred to Cascade Peak Hotel Pty Ltd on December 7th 2016, and the project had been put on hold. Efforts were put in place to extend the period of the project timeline, and to get the project back on track.

Phase 3 was originally to start by 7th January and the planting completed by 11th March.

Due to the delay of the project being on hold, this phase was adjusted to allow for the additional time and was scheduled to start on 7th February and was scheduled to be finished by 4th April 2017.

Phase 3 was started on time by the 7th February, however finished by the 12th April. This is 8 days past the scheduled timeframe.

Overall, the initial time frame allowed for this project would have finished generally on time if there had been no hold period. The duration of the project has been executed with little variance in time frame - 9 days in excess, taking in consideration the unpredictability of weather conditions and project delays.

Project Report Submitted to:		
Name: Terrance Mackay	Title: General Manager - Cascade Peak Hotel	Date: 17 th April 2017
Name: Kim Nguyen	Title: Director - Awesome Landscapes	Date: 17 th April 2017
Name: Kate Chan	Title: Project Manager Timber Home Construction	Date: 17 th April 2017
Name: Stephen Lyons	Title: Planning Manager - Cascade Peak Shire Council	Date: 17 th April 2017

Analysis of Project

Guidance:

- a. *Process Review* - Describe all of the processes used during the planning, implementation and closure stages.
- b. *Lessons Learnt* - Describe what went right and or what went wrong and how effective were the management and the processes you used. If necessary, state how you overcame any problems.
- c. *Recommendations* – Make recommendations as a result of the lessons learned.

Scope

Process Review

A work Break down process has been used as part of the Scope defined in the Project Plan. This has helped to identify what task and role Awesome Landscapes needed to arrange for. The Gantt Chart also helped to identify what tasks and when this needed to be done. A resource requirement worksheet was used to identify what resources was required for each task and a detailed Resource Allocation template was effectively used to identify who, what role was required and the number of people needed to complete the task.

Lessons Learnt

All these processes were effectively used to keep the sope of the works goal in line with the project Sponsor's overall expectation and goal. Although all information is kept altogether, it can be difficult to locate the information one may specifically search for.

Recommendations

A format for the forms for information to be more quickly accessed or referenced like in an excel spreadsheet with drop-down options of key words to identify particular roles or task information.

Time

Process Review

A Gantt chart was used to control and monitor the time constraints for this project. Key milestones were identified and their dates set for when each was required to be completed by. The Project's critical path was recognized as well through looking at all the tasks and identifying the best path to take so that the project was completed within the minimum amount of time.

Lessons Learnt

Due to changes to the scope and the project was put on hold, the project timeline had to be increased from nine months to twelve months. The Project's time constraints were adjusted to accommodate this and arrange for enough time for the project to reach completion date expectation. As there were changes, the project did fall behind by 9 days. More lag time would have been required to reach completion.

Recommendations

Allow for slightly more lag time between tasks. However I feel for the complexity and hold ups experienced from the job, 9 days over the completion date is to be expected.

Cost

Process Review A project S-Curve chart, a Summary of costings per Phase spreadsheet, a project Cashflow budget and chart are processes that have been used to monitor the cost of the project.
Lessons Learnt The Cash flow of the project initially did not allow enough money for each stage compared to the expenditure for the project. The surplus would have to be used to accommodate necessary costs before payment would be received.
Recommendations Ideally set the cashflow up to have each phase covered with enough funds to cover all costs expected and have enough money remaining to cover additional changes or costs - Use past projects that are similar to this landscaping project to identify where each phase is over spending and work out a percentage to cover potential additional costs.
Quality
Process Review An overview of the quality standards were outlined in the Project Plan to be followed, which included council, building and licensing regulations. Quality Assurance process was used by monthly audit conducted mostly by the site supervisor. A Council auditor was sent on a monthly basis, and prior to this an internal audit was to be conducted at the end of each stage. A clearly defined list of audits conducted by the project manager is listed in the Project Plan Version 4. A Quality Analysis tool spreadsheet (appendix 9) was used and a Quality Plan for scenarios.
Lessons Learnt The quality control processes put in place were effective, as no issues were raised that work performed did not meet requirements.
Recommendations Based on the effectiveness of the quality control processes, no recommendations are suggested.
Human Resources
Process Review Human Resources are listed in the Project plan with a list of the stakeholders and a Stakeholder Analysis Template, Staffing management plan is also included, as staff will perform duties for this project around other projects or operational work that they may have. Appendixes 13 - Responsibility Matrix, and appendice 15 Resource requirement worksheet are also processes included for Human Resources.
Lessons Learnt Due to risk from changes when the project sponsor changed, retaining staff was a necessity as well as recruiting a two new landscapers and subcontractors
Recommendations More emphasis needs to be put into the support and continuation of staff employment with job satisfaction and security at the forefront.
Communications

Process Review

Awesome Landscapes operates as a service provider, so a formal and informal organisation structure had been developed. Appendix 11 is formal structure and informal is appendix 12. This includes subcontracting companies as well. As part of the communication information, tasks have been broken down and identified who will be conducting these tasks. A procedure was put in place for escalation of issues as per the Project Plan V4.

A communications plan and a communication requirements analysis and a responsibility Matrix is supplied to control situations.

Lessons Learnt

Massive Eco-development went into liquidation. Communication from all stakeholders and Massive Eco should have been in place to prepare for the project being placed on hold. Job security for team members should have been made priority for communication, however two landscapers quit shortly after Massive Eco went into liquidation.

Recommendations

More communication between stakeholders and team members regarding the status of their job security.

Procurement

Process Review

Processes were used to coordinate procurement and defined in the Project Plan Version 4 item 9.1 page 34 of 151. Contracts were produced for subcontractors, and was based on the strong working relationship as preferred suppliers for Awesome Landscapes. Statements of work were received for the work to be done.

Lessons Learnt

JP Digging contractor did not have a good rapport with the Project's new Sponsor. A new Contractor and landscapers were required after the handover of new Sponsor.

Recommendations

While a good rapport with other contractors and suppliers is ideal, a Short-list of both subcontractors and suppliers by sending out tenders for the proposed project is recommended to ensure that procurement needs are met and has availability to provide the work or supplies should it be required.

Risk

Process Review

The process for Risk control was evaluated thoroughly using the methodology put in place structured for Awesome Landscapes. Constraints, Assumptions, Potential Issues and Risks were summarized in the Project Plan, and a more detailed evaluation was detailed in appendices 22, 23, 24, 25, 26, 27, 28, 29, 30 and 31

Lessons Learnt

Whilst it was considered a risk that landscapers or the site supervisor would leave, it was not considered that the project Sponsor would go into Liquidation and the project going on hold. This lead to the risk of not meeting timeframes due to damage that had happened to the project during this hold time.

Recommendations

I recommend that this risk is added to any future project - that the client sponsor is unable to meet contractual financial obligations, and the potential it would lead to for projects, and to put in place an organisational plan for Awesome Landscapes employees and contractors should this happen.

Project Integration

Process Review

The methodology used in the integration management was the PMBOK, ensuring all aspects of Project management are covered - Scope, Time, Cost, Quality, Human Resources, Communications, Risk, Procurement and Integration.

Lessons Learnt

This methodology used covered all aspects of the project and was easily accessible for charts and information gathering for the project. The project, despite the setbacks from outside influences, was kept on track after the adjustment in the project finish date due to the integration of all aspects of the project thoroughly detailed.

Recommendations

Whilst this methodology worked well with organising the project and integration, not all projects are completely predictable. It is recommended that all lessons learnt from the project is to be considered in any future similar projects for the planning to ensure Awesome Landscapes adaptability and long term success in projects. This methodology should be used as well, which worked well with keeping the project on track and successfully delivering the desired goal of the sponsor and project - an Eco friendly resort.

4. Sam has approved the report in the above question to be distributed. He has also updated the project plan following your advice. Now he is ready for the project closure meeting. He has assigned you the task of organising this meeting.

Answer the questions that follow.

a. Who will attend this meeting? Guidance: List the attendees by name, job title, and organisation).
Terrence Mackay - General Manager for Cascade Peak Hotel Kim Nguyen - Director of Awesome Landscapes Sam Ng - Project Manager of Awesome Landscapes Stephen Lyons - Planning Manager of Cascade Peak Shire Council Kate Chan - Project Manager for Timber Home Construction
b. What information will each person need before the meeting?
Project completion report, finalised project plan, project archives checklist, formal acceptance and closure
c. Which documents (and which version number of each document) will need to be printed off for the meeting?
Project Plan Version 4, Project Charter Version 4, Work Results Guidelines Template, Lessons Learned documents
d. Which of these documents will require signatures?
The completion report, project plan and formal acceptance and closure form.
e. Who will need to sign off on these documents?
Each steering committee member - Terrance Mackay, Kim Nguyen, Sam Ng, Stephen Lyons & Kate Chan.
f. Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.
Yes I believe the project objectives aligned with Awesome Landscapes throughout the entire project. This is because a strong emphasis went into the consideration and maintaining of the natural landscape of the area and local native plants of the Cascade Peak Hotel project. Awesome Landscapes has an objective to make the Cascade Peak region an ecologically friendly region using local vegetation that blends well with the natural setting.
g. What needs to be done after the meeting to complete the closure of the project?

Awesome Landscapes can now raise a final invoice for the contract payment from Cascade Peak Hotel. Upon payment being received, all documentation is to be archived and use the archiving checklist to ensure each document is archived in both hard and electronic versions and scanned into the network.

WORKBOOK CHECKLIST

When you have completed this workbook, please ensure you have completed all parts of it:

☐ **Case Study**

IMPORTANT REMINDER

Students must achieve a satisfactory result to ALL assessment tasks to be awarded COMPETENT for the unit relevant to this subject.

To award the student competent in the units relevant to this subject, the student must successfully complete all the requirements listed above according to the prescribed benchmarks.

End of Document