



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **TLIP5004A Develop a transport and logistics business plan**

**Release: 1**

## **TLIP5004A Develop a transport and logistics business plan**

### **Modification History**

Not Applicable

## Unit Descriptor

### Unit Descriptor

This unit involves the skills and knowledge required to develop a business plan for an organisation or a discrete business unit in the transport and logistics industry in accordance with relevant regulatory requirements and workplace procedures. This includes conducting a situational and market analysis, analysing the organisational environment, developing appropriate strategies, and implementing and evaluating the resulting business plan. Licensing, legislative, regulatory or certification requirements are applicable to this unit.

## Application of the Unit

### Application of the Unit

Business activities must be carried out in compliance with the relevant Australian and international regulations, standards and codes of practice.

Work is under general guidance on progress and outcomes of work. It requires discretion and judgement for self and others in planning and using resources, services and processes to achieve required outcomes within workplace policy and procedures.

A range of opportunities may be used to develop the work area and to support the development of work systems, innovative strategies to deal with contingencies and to encourage the achievement of the workplace's goals and key performance objectives by the work area and the individuals and teams within it.

The unit generally applies to those with responsibility for resource coordination and allocation and who provide leadership of others individually or in teams.

## Licensing/Regulatory Information

Refer to Unit Descriptor

## Pre-Requisites

Not Applicable

## **Employability Skills Information**

**Employability Skills**                      This unit contains employability skills.

## **Elements and Performance Criteria Pre-Content**

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Assessment of performance is to be consistent with the evidence guide.

## Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<b>1 Conduct a situational and market analysis</b>	<p>1.1 The transport and logistics business's principal services, markets, products and the factors that distinguish the business and contribute to its success are identified</p> <p>1.2 The transport and logistics business/operating environment is defined and reviewed using information from staff members, customer feedback and external sources</p> <p>1.3 Qualitative and quantitative market analysis data is documented</p> <p>1.4 Target markets and relevant regulatory requirements are identified</p> <p>1.5 Impact of transport and logistics business on market is recorded and projected change in market and/or services during the life of the plan is projected</p> <p>1.6 Competitors, customer perceptions and market share of existing competitors operating in the transport and logistics industry are identified</p> <p>1.7 Proposed business focus on specific target markets, pricing, sales and appeals are defined</p> <p>1.8 Potential profitable opportunities are identified and documented</p>
<b>2 Analyse organisational environment</b>	<p>2.1 Current transport and logistics business operations, practices, work flow, equipment and facilities are analysed</p> <p>2.2 Capability of the organisation in terms of technology, research, development and tools is outlined</p> <p>2.3 Current resources and any resources that may be accessed to meet identified opportunities for business operations are evaluated</p> <p>2.4 Developments in technologies predicted within the lifetime of the business plan are evaluated and analysed</p> <p>2.5 Capability of the organisation in terms of staff, equipment, facilities, operational systems and financial status are assessed for strengths and weaknesses</p> <p>2.6 Costs of making operational adjustments in relation to existing and new business to influence improved profitability and positioning are reviewed</p> <p>2.7 Premises for decisions are documented, potential circumstances which may alter the environment are identified and contingency provisions are made</p>
<b>3 Develop strategies</b>	<p>3.1 Benchmark goals are documented and checked for realism in terms of internal and external environmental factors</p> <p>3.2 Decisions and adjustments regarding resource allocation to various products and services are made, based on external and internal analyses</p>

**ELEMENT****PERFORMANCE CRITERIA**

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|   | 3.3 Organisational adjustments are documented and implementation strategies are established   |
|   | 3.4 Projections of profit and loss or income statements per quarter until break-even point are constructed for the whole organisation and each cost centre                        |
|   | 3.5 A finalised business plan including performance indicators is prepared in accordance with enterprise requirements and circulated to stakeholders                              |
|   | 3.6 Questions and feedback from stakeholders are responded to promptly and, where appropriate, incorporated into the plan   |
| <b>4 Implement and evaluate business plan</b> | 4.1 Implementation plans for the management of workplaces, staff, business operation and operational systems are monitored and, where required, adjustments to the plans are made |
|   | 4.2 Current and future marketing strategies and any areas of specialisation are detailed and implemented  |
|   | 4.3 Performance of the organisation in relation to the identified performance indicators are regularly monitored and reviewed   |

**Required Skills and Knowledge****REQUIRED KNOWLEDGE AND SKILLS**

This describes the essential knowledge and skills and their level required for this unit.

**Required knowledge:**

- Australian and international regulations, codes of practice and legislative requirements relevant to business operations
- Relevant OH&S and environmental protection procedures and regulations
- Workplace processes for the development of a transport and logistics business plan
- Problems that may occur during the development of a transport and logistics business plan, and action that can be taken to report or resolve the problems
- Hazards that may exist in the operation of a transport and logistics business, and ways of controlling the risks involved
- Focus of operation of competitor and internal business systems, resources, management and workplace operating systems
- Equipment applications, capacities, configurations, safety hazards and control
- Market and other external environmental factors including the regulatory environment
- Organisational strengths and weaknesses including the competencies of individuals in the team/group

## REQUIRED KNOWLEDGE AND SKILLS

- Application of relevant Australian and international standards and associated certification requirements
- Resource availability including the competencies of individuals in the team or group
- The application of current competencies within functional activity
- Relevant workplace documentation procedures

### Required skills:

- Communicate effectively with others when developing a transport and logistics business plan
- Read and interpret business and market data, regulatory requirements and other planning information relevant to the development of a transport and logistics business plan
- Prioritise work and coordinate self and others in relation to workplace activities
- Complete documentation related to work activities and the development of a transport and logistics business plan
- Operate electronic communication equipment to required protocol
- Provide leadership and work collaboratively with others when developing a transport and logistics business plan
- Adapt appropriately to cultural differences in the workplace, including modes of behaviour and interactions with others
- Promptly report and/or rectify any identified problems that may arise during the development of a transport and logistics business plan in accordance with workplace procedures
- Apply precautions and required action to minimise, control or eliminate hazards that may exist during work activities
- Plan and organise business systems and activities
- Monitor work activities in terms of planned schedule
- Modify activities to cater for variations in workplace contexts and environment
- Work systematically with required attention to detail without injury to self or others, or damage to goods or equipment
- Select and apply appropriate technology, information systems and procedures
- Adapt to differences in equipment in accordance with standard operating procedures

## Evidence Guide

### EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge and skills, the range statement and the assessment

## EVIDENCE GUIDE

guidelines for this Training Package.

### **Critical aspects for assessment and evidence required to demonstrate competency in this unit**

- The evidence required to demonstrate competency in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria of this unit and include demonstration of applying:
  - the underpinning knowledge and skills
  - relevant legislation and workplace procedures
  - other relevant aspects of the range statement

### **Context of and specific resources for assessment**

- Performance is demonstrated consistently over a period of time and in a suitable range of contexts
- Resources for assessment include:
  - a range of relevant exercises, case studies and/or other simulated practical and knowledge assessment, and/or
  - access to an appropriate range of relevant operational situations in the workplace
- In both real and simulated environments, access is required to:
  - relevant and appropriate materials and equipment, and
  - applicable documentation including workplace procedures, regulations, codes of practice and operation manuals

### **Method of assessment**

- Assessment of this unit must be undertaken by a registered training organisation
- As a minimum, assessment of knowledge must be conducted through appropriate written/oral tests
- Practical assessment must occur:
  - through activities in an appropriately simulated environment, and/or
  - in an appropriate range of situations in the workplace

## Range Statement

### **RANGE STATEMENT**

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance.



## RANGE STATEMENT

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|---|---|
| Work may be undertaken:   | <ul style="list-style-type: none"><li>• in various work environments in the warehousing, storage, transport, and logistics industries</li></ul>   |
| Customers may be:   | <ul style="list-style-type: none"><li>• internal or external</li></ul>  |
| Transport and logistics operations may be conducted:  | <ul style="list-style-type: none"><li>• by day or night</li><li>• in all weather conditions</li></ul>   |
| The workplace environment may involve:  | <ul style="list-style-type: none"><li>• twenty-four hour operation</li><li>• single and multi-site locations</li><li>• large, medium and small workplaces</li></ul>   |
| Business systems may include:   | <ul style="list-style-type: none"><li>• transport and logistics policies, protocols and procedures</li><li>• communications systems</li><li>• scope of workplace operations</li><li>• authorities and permits</li><li>• hours of operation</li><li>• relevant regulations</li></ul>   |
| The transport and logistics business plan may be:   | <ul style="list-style-type: none"><li>• developed for a whole organisation or a business unit within an organisation</li></ul>  |
| Products may be:  | <ul style="list-style-type: none"><li>• goods and/or services</li></ul>   |
| Consultative processes may involve:   | <ul style="list-style-type: none"><li>• employees, supervisors and managers</li><li>• suppliers and current or potential clients</li><li>• relevant authorities, government departments and institutions</li><li>• representatives of other enterprises and organisations</li><li>• industrial relations and OH&amp;S specialists</li><li>• other professional or technical staff</li></ul> |
| Communications systems may involve:   | <ul style="list-style-type: none"><li>• fixed and mobile telephone</li><li>• radio</li><li>• fax</li><li>• email</li><li>• electronic data transfer of information</li><li>• mail and internal memo</li><li>• RF systems</li></ul>  |
| Depending on the type of organisation concerned and the local terminology used, workplace procedures may include: | <ul style="list-style-type: none"><li>• company procedures</li><li>• enterprise procedures</li><li>• organisational procedures</li><li>• established procedures</li></ul>   |
| Documentation/records may include:  | <ul style="list-style-type: none"><li>• Australian and international codes of practice and regulations relevant to business operations</li><li>• Australian and international regulations and codes of</li></ul>  |

## RANGE STATEMENT

- practice for the handling, storage, transfer and transport of dangerous goods and hazardous substances, including the ADG and IDG Code
- workplace operating procedures and policies
  - operations manuals, job specifications and procedures and induction documentation
  - safe working limits (SWL) and working load limits (WLL) of transport options
  - supplier and/or client instructions
  - Australian and international standards, criteria and certification requirements
  - communications technology equipment and oral, aural or signed communications
  - quality assurance standards and procedures
  - emergency procedures
  - relevant competency standards and training materials
  - QA plans, data and document control
  - conditions of service, legislation and industrial agreements including workplace agreements and awards
- Applicable procedures and codes may include:
- regulations and codes of practice relevant to business operations
  - Australian and international regulations and codes of practice for the handling, storage, transport and transfer of dangerous goods and hazardous substances, including:
    - Australian and International Dangerous Goods Codes
    - Australian Marine Orders and the International Maritime Dangerous Goods Code
    - IATA Dangerous Goods by Air Regulations
    - Australian and International Explosives Codes
  - relevant Australian and international standards and certification requirements
  - relevant state/territory OH&S legislation
  - relevant state/territory environmental protection legislation
  - relevant licence or permit requirements and associated regulations
  - patent or copyright arrangements
  - relevant workplace relations legislation
  - relevant workers compensation legislation
  - equal opportunity, equal employment opportunity and affirmative action legislation

## **Unit Sector(s)**

Not Applicable

## **Competency Field**

**Competency Field**

P - Administration and Finance