

## UNIT SUMMARY

---

### What is the unit about?

Every organisation should have an overall strategic business plan and each identified area of responsibility should also have an operational plan that will contribute to achieving the objectives set out in the strategic business plan.

The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

### Who is the unit for?

The unit is recommended for middle managers.

### Links to other units

This unit is linked to units **B6. Provide leadership in your area of responsibility**, **D6. Allocate and monitor the progress and quality of work in your area of responsibility**, **E2. Manage finance for your area of responsibility** and **F3. Manage business processes** in the overall suite of National Occupational Standards for Management and Leadership.

### Skills

Listed below are the main generic 'skills' that need to be applied in developing and implementing operational plans for your area of responsibility. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Planning
- Risk management
- Delegating
- Networking
- Involving others
- Innovating
- Consulting
- Communicating
- Influencing and persuading
- Monitoring
- Evaluating
- Setting objectives
- Building consensus

## OUTCOMES OF EFFECTIVE PERFORMANCE

---

You must be able to do the following:

1. Balance new ideas with tried and tested solutions.
2. Balance risk with desired outcomes.
3. Make sure your plans are consistent with the objectives of your area of responsibility.
4. Make sure your plan is flexible and complements related areas of work.

5. Develop and assign objectives to people together with the associated resources.
6. Win the support of key colleagues and other stakeholders.
7. Monitor and control your plan so that it achieves its overall objectives.
8. Evaluate the implementation of your plan and make recommendations that identify good practice and areas for improvement.

## BEHAVIOURS WHICH UNDERPIN EFFECTIVE PERFORMANCE

---

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

## KNOWLEDGE AND UNDERSTANDING

---

You need to know and understand the following:

### General knowledge and understanding

1. Principles and methods of short to medium-term planning.
2. The importance of creativity and innovation in operational planning.
3. How to develop and assign objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).
4. How to analyse and manage risk.
5. How to develop and plan for contingencies.
6. Principles and methods of delegation.
7. How to use resources effectively to achieve objectives.
8. How to consult with colleagues and other key stakeholders.
9. How to monitor and control operational plans to achieve their objectives.
10. How to develop and use an evaluation framework.

**Industry/sector specific knowledge  
and understanding**

1. Legal, regulatory and ethical requirements in your sector.
2. Market developments in your sector.
3. Actual and potential competitors, and their strategies and plans.
4. Actual and potential partners, and their strategies and plans.

**Context specific knowledge  
and understanding**

1. The market in which your organisation works.
2. The overall vision of your organisation and the goals you are responsible for achieving.
3. Your organisation's actual and potential customer base.
4. Available market opportunities.
5. How to respond to market opportunities.
6. Colleagues and other key stakeholders, and their needs and expectations.
7. Processes for consultation.
8. Sources of information you can use to monitor and evaluate plans.
9. Procedures for reporting and making recommendations.