
Citrus Business Management Programme

Module 5 – part 2

**Manage your Business:
The Basics**

Formative PoE Guide

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Assessor Orientation

Background Information

The main theme of this module is to help entrepreneurs manage the day-to-day actions of their business.

The module will cover aspects such as:

- ❖ Business writing
- ❖ Spatial planning and measurement basics
- ❖ Resource mobilisation
- ❖ Action Plans

This module contributes to the exit level outcome and associated criteria:

4. Manage a new venture by applying business principles and techniques.

- 4.1 A business plan for a new venture is developed using strategic planning principles and techniques.
- 4.2 Guidelines for the implementation and monitoring the strategic action plan are formulated in terms of milestones and timeframes.
- 4.3 Financial management planning principles and techniques are applied in order to manage the business in an efficient and effective manner.
- 4.4 Production and / or operations management is applied in a chosen business opportunity.

This module comprises of 5 unit standards and attracts 22 credits, and is presented in two different study guides.

This module is aligned to unit standards:

Part 1	Business writing	12153	Use the writing process to compose texts required in the business environment	F	4	5
		119465	Write / present / sign texts for a range of communicative contexts	F	3	5
	Spatial planning and measurement basics	9016	Represent, analyse and calculate shape and motion in two- and three-dimensional space in different contexts	F	4	4
Part 2	Resource mobilisation	114590	Mobilise resources for a new venture	C	4	4
	Action plans	263534	Implement an action plan for a new venture	C	4	4

Unit Standard Information

Mobilise resources for a new venture

SAQA US ID		UNIT STANDARD TITLE		
114590		Mobilise resources for a new venture		
ORIGINATOR				
SGB Generic Management				
PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY				
-				
FIELD			SUBFIELD	
Field 03 - Business, Commerce and Management Studies			Generic Management	
ABET BAND	UNIT STANDARD TYPE	PRE-2009 NQF LEVEL	NQF LEVEL	CREDITS
Undefined	Regular-Fundamental	Level 4	NQF Level 04	4
REGISTRATION STATUS		REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Reregistered		2015-07-01	2018-06-30	SAQA 10105/14
LAST DATE FOR ENROLMENT		LAST DATE FOR ACHIEVEMENT		
2019-06-30		2022-06-30		

In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.

This unit standard does not replace any other unit standard and is not replaced by any other unit standard.

PURPOSE OF THE UNIT STANDARD

This Unit Standard is intended for people who have to ensure that resources are utilised effectively in a small business venture. The learner will also be able to identify opportunities to improve the effectiveness of resources.

The qualifying learner will be able to:

- Identify and utilise available resources.
- Evaluate the resources contribution to effective business performance.
- Seek and use professional advice to supplement competencies.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

Learners accessing this Unit Standard should be competent in Mathematical Literacy and Communications at NQF Level 3.

UNIT STANDARD RANGE

The following elements are included but are not limited to:

- Objectives: requirements of the business, short term objectives, long term objectives, realistic time frames, milestones and targets, measurable outcomes.
- Advisors: lawyers, accountants, specialist consultants and business counsellors.
- Fees: up-front costs, tax allowances, cost benefits.

Implement an action plan for a new venture

SAQA US ID	UNIT STANDARD TITLE			
263534	Implement an action plan for a new venture			
ORIGINATOR				
Task Team - New Venture Creation				
PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY				
-				
FIELD			SUBFIELD	
Field 03 - Business, Commerce and Management Studies			Generic Management	
ABET BAND	UNIT STANDARD TYPE	PRE-2009 NQF LEVEL	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	NQF Level 04	4
REGISTRATION STATUS		REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Reregistered		2015-07-01	2018-06-30	SAQA 10105/14
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In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.

This unit standard replaces:

US ID	Unit Standard Title	Pre-2009 NQF Level	NQF Level	Credits	Replacement Status
114591	Implement an action plan for business operations	Level 4	NQF Level 04	4	Complete

PURPOSE OF THE UNIT STANDARD

This Unit Standard is intended for learners within Small, Micro and Medium Enterprise Sector. The learner will be able to implement an action plan, in terms of the practical and physical aspects, derived from a business plan for establishing a new venture.

Learners credited with this unit standard will be able to:

- Design an action plan for a new venture.
- Set up business premises and operational systems.
- Implement business financial systems.
- Identify the risks associated with the new venture.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

It is assumed that the learner has the following knowledge and skills:

- Communication at NQF Level 3.

UNIT STANDARD RANGE

N/A

information

Unit Standard References

The SAQA registered unit standards associated with this learning program are included in this guide for your information.

Please do not hesitate to ask the facilitator or assessor to explain anything that you do not understand or need help with.

Associated Qualification

This unit standard forms part of the learner support materials for the following qualification:

Further Education and Training Certificate: New Venture Creation

SAQA QUAL ID		QUALIFICATION TITLE		
66249		Further Education and Training Certificate: New Venture Creation		
ORIGINATOR				
Task Team - New Venture Creation				
PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY			NQF SUB-FRAMEWORK	
SERVICES - Services Sector Education and Training Authority			OQSF - Occupational Qualifications Sub-framework	
QUALIFICATION TYPE	FIELD	SUBFIELD		
Further Ed and Training Cert	Field 03 - Business, Commerce and Management Studies	Generic Management		
ABET BAND	MINIMUM CREDITS	PRE-2009 NQF LEVEL	NQF LEVEL	QUAL CLASS
Undefined	149	Level 4	NQF Level 04	Regular-Unit Stds Based
REGISTRATION STATUS		SAQA DECISION NUMBER	REGISTRATION START DATE	REGISTRATION END DATE
Reregistered		SAQA 10105/14	2015-07-01	2018-06-30
LAST DATE FOR ENROLMENT		LAST DATE FOR ACHIEVEMENT		
2019-06-30		2022-06-30		

In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.

This qualification replaces:

Qual ID	Qualification Title	Pre-2009 NQF Level	NQF Level	Min Credits	Replacement Status
23953	Further Education and Training Certificate: New Venture Creation (SMME)	Level 4	NQF Level 04	162	Complete

Learner Details

First name:	
Surname:	
ID number:	
Mobile phone contact number:	
E-mail address:	
Postal address:	
Dates on which you completed this formative PoE guide:	
Declaration:	I hereby confirm that: • I received the assessment plan and schedule. • I understand my rights in terms of special needs, re-assessment, feedback and appeals against assessment decisions. • I completed the formative assessment independently without assistance from anyone else.
Date:	
Place:	
Signature:	
Signature of Assessor:	

information

Important

Please remember that this document is seen as legal evidence of your competence. It is very important that you sign and date each section where requested. Your signature confirms that this work is your own and that you have not committed fraud in any way.

Learner Assessment Plan and Schedule

What?

What is it that I will be assessed in?

- ❖ You will be assessed in the outcomes for unit standard 114590 and 263534.

What will be expected of me during the formative assessment?

- ❖ You have to complete ALL the activities in the formative portfolio of evidence guide during the course of the learning.
- ❖ If you are assigned a teamwork or paired practice activity, it is your responsibility to attach key notes, a copy, a picture or a sample of the evidence produced by your team. (Please do NOT leave blank activities).
- ❖ Please write in pen at all times.
- ❖ Please make sure that you sign and date the pages where requested.

What will be expected of me during the summative assessment?

- ❖ Please work alone to complete these activities and questionnaires. If you copy work from others or let them copy your work, you will automatically be declared not yet competent.
- ❖ Please do NOT leave blank activities.
- ❖ Please write in pen at all times.
- ❖ Please make sure that you sign and date the pages where requested.

Where?

Where will the assessment take place? (Venue)

- ❖ All assessments will take place at the training centre in the training room under supervision of the evidence collecting facilitator.

Who?

Who is the assessor?

- ❖ The assessors are Zama Madikizela and Mpho Mazubane.

How can I contact the assessor if something unforeseen happens?

- ❖ You can contact them at the Scientific Roets office on (039) 727-1515 or via email: zama@scientificroets.com or mpho@scientificroets.com.

When?

On which date and at what time will the assessment take place or should my formative PoE be handed in?

- ❖ The formative assessment activities are completed during the presentation of the learning programme module.

- ❖ Your completed formative portfolio of evidence has to be handed in on Friday of this training week at the close of the day.
- ❖ The summative assessments take place after the completion of each chapter.
- ❖ The facilitator will put up a schedule of times for summative assessments in the classroom.
- ❖ Please check it carefully and make sure you prepare by revising the information in your formative PoE and by completing the self-assessment exercise in your learner workbook.

How?

How will I be assessed, and what kinds of assessment instruments are included in this PoE?
Formative assessment includes a range of team and individual learning activities as follows:

- ❖ Section 1 Formative Assessment Activities
 - F114590.1 – Team Research Worksheet and Mind Map
 - F114590.2 – Team Discussion with Key Notes
 - F114590.3 – Team Brainstorming Session and Role-play
- ❖ Section 2 Formative Assessment Activities
 - F263534.1 – Team Discussion, Poster and Class Presentation
 - F263534.2 – Paired Case Study, Mind Map and Presentation
 - F263534.3 – Paired Research Presentation
 - F263534.4 – Paired Flow Diagram with Key Notes
 - F263534.5 – Team Risk Management Case Study and Mind Map Presentation

Summative assessment includes the following assessment instruments:

- ❖ Section 1 Summative Assessment Activities
 - S114590.1 – Research Questionnaire
 - S114590.2 – Case Study and Knowledge Questionnaire
 - S114590.3 – Subject Matter Expert Interview
- ❖ Section 2 Summative Assessment Activities
 - S263534.1 – Case Study and Work Sample
 - S263534.2 – Case Study, Work Samples and Knowledge Questionnaire
 - S263534.3 – Research Questionnaire
 - S263534.4 – Flow Diagram and Knowledge Questionnaire
 - S263534.5 – Risk Management Case Study and Mind Map and Knowledge Questionnaire

What do I need?

For your formative assessment you will need:

- ❖ Your formative PoE guide

- ❖ Your learner guide
- ❖ A dictionary
- ❖ Access to your learning team members
- ❖ Access to the internet
- ❖ Stationery

For your summative assessment you will need:

- ❖ Your summative PoE guide
- ❖ A dictionary
- ❖ Access to the internet
- ❖ Stationery

Who else may be involved?

Are there other people who need to be involved in this assessment process?

For the formative assessment, you may work with the other members of your learning team.

For the summative assessment the following people will form part of the process:

The evidence collecting facilitators:

- ❖ Their role is to guide and support you in the collection of the evidence and to prepare you for summative assessment.

The assessor:

- ❖ The assessor will evaluate all the formative and summative evidence of assessment that you include in your portfolios and determine if it shows that you are competent in the outcomes of the unit standard(s).
- ❖ He / she will also give you feedback on your competence and guide you in case you need to submit additional evidence of your competence.

The moderator:

- ❖ The moderator will do spot checks on evidence and make sure that the assessment process has been completed correctly.

How will I know if the process is complete?

What will happen once I have completed this assessment process and the workbook has been handed in?

- ❖ The portfolios are submitted to the assessor for marking and evaluation.
- ❖ During the week when you are at home you will receive feedback via telephone call, SMS or email from the assessor.
- ❖ On your first day back in class, you will receive the formal written feedback document from the assessor. You need to read it carefully and sign it off. It is important to complete the supplementary activities or re-assessment as communicated by the assessor to be able to reach competence.
- ❖ The process is only complete after you have received feedback and a final competence declaration from the assessor.

What if?

What if I am not ready to be assessed?

- ❖ If you feel that you are not ready to be assessed, you should contact the evidence collecting facilitator to make alternative arrangements.
- ❖ You should also inform the assessor via email of the reasons why you feel that you are not ready for assessment, and confirm what alternative arrangement has been agreed.
- ❖ Attach a copy of your written request to the first page of this portfolio of evidence.

What if I have a special need, for example, a translator or I struggle to write?

- ❖ If you have a special need (you need a translator or you struggle to write fast or you are living with a disability), then it is important that you inform the evidence collecting facilitator and the assessor at the BEGINNING of the learning week in writing, please.
- ❖ Attach a copy of your written request to the first page of this portfolio of evidence.

What if I get sick on the day of assessment?

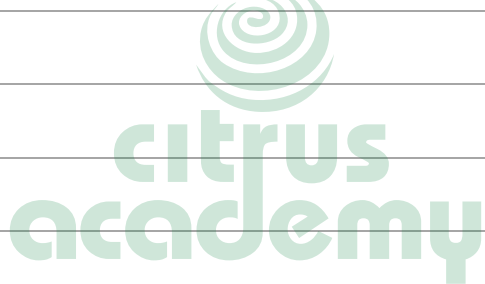
- ❖ If you are sick on the day of assessment, you should contact the evidence collecting facilitator to make alternative arrangements.
- ❖ You also need to submit a doctor's note.
- ❖ You should also inform the assessor via email of the fact that you were sick and confirm what alternative arrangement has been agreed.
- ❖ Attach a copy of your written request and the doctor's note to the first page of this portfolio of evidence.

What if I am not happy with the assessor's decision?

- ❖ You have the right to appeal the assessor's competence decision.
- ❖ The appeals procedure and application form is available from the evidence collecting facilitator on request.

F114590.1 – Team Research Worksheet and Mind Map

- ### Instructions:

- 
- 

2. Select 5 of the resources identified on your list, and write down key notes on the main purpose and function (why it is needed), of the resource.

Resource	Main purpose and function
1	
2	
3	
4	
5	

3. Now look at the list of resources again, and then write down some key notes on possible institutions that could help you with expertise to obtain, manage and optimise the use of these resources for your citrus production unit. An example would be, the CRI could assign an extension officer to advise you on selecting and planting the best cultivar of citrus trees (stock) for your geographical area, soil types, and to meet market demands.

4. Draft a mind map to explain the requirements for your citrus production unit to access each of the following types of resources:

4.1. Natural resources

4.2. Human resources

4.3. Infrastructure

4.4. Financial resources

4.5. Include the following information on your mind map for each:

Conditions, procedures, costs and information required to access resources in order to determine whether or not they are affordable.



5. In order to access the support, funding and advice required to start and run a successful citrus production unit, you will more than likely be required to register, fill in forms and provide supporting documentation about your enterprise.

Access the following websites: <http://www.citrusres.com/>, www.crw.org.za,
<https://www.citrusacademy.org.za/>, <http://www.cga.co.za/>,
<http://www.daff.gov.za/doaDev/sideMenu/links/Digest2.htm>

Now summarise a list of:

- 5.1. The kind of support and assistance you could obtain from each.

- 5.2. Explain how they will know you need assistance (how do you apply or register?).

- 5.3. Make brief key notes on the types of documents you think may be required, by each institution to best support and help you.

F114590.2 – Team Discussion with Key Notes

- ✓ Work as a team to complete this activity.
- ✓ You will need to access the internet to complete this activity.
- ✓ Time to spend on this activity: 1 ½ hours.

Instructions:

Consider the following case in terms of establishing a new orchard on an existing citrus production unit, which your organisation recently purchased.

Option A: The cultivars planted are not bearing export quality fruit (but quality and yield could be improved with investment in improved production practices, installation of a new fertigation system, and by hiring a citrus consultant to mentor a new production manager and extended production team.

OR

Option B: The existing quality and yield can be sent to the juicing factory, and you could decide to establish new orchards. The costs of establishing new orchards are considerably more, as it also includes extending the irrigation dam and system. The soil has however been tested and is optimal for the establishment of new trendy cultivars that could yield far higher profits within the next three years. The new orchards will obviously keep yielding for the next 25-30 years.

You are the management team who has to decide which route to take.

1. Discuss what your main thought process would be when making this kind of decision. (Record notes).

2. Now identify the specific resources that would be needed for each of the scenarios. List the resources below.

3. How would you go about determining whether investment in each of the resources listed above contributes to the business objectives?

4. Choose one of the two scenarios and draft a SWOT analysis to determine the possible impact of investment in that scenario on the objectives of the business.

4.1. Which scenario did you choose?

☐ A ☐ B

Internal	Strengths	Weaknesses
External	Opportunities	Threats

5. What is the formula for calculating return on investment?

6. What criteria would you consider when calculating the return on investment for each of the two scenarios, to ensure a sound decision?

F114590.3 – Team Brainstorming Session and Role-play

- ✓ Work as a team to complete this activity.
- ✓ Time to spend on this activity: 1 hour.

Instructions:

1. Hold rolling a brainstorming session to identify where you could go / who you could ask to get expert advice and assistance for each of the following:

1.1. Information technology (IT)

1.2. Labour issues

1.3. Accounting

1.4. Legal services

1.5. Auditing

1.6. Bookkeeping

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1.7. Security

1.8. Citrus production practices

1.9. Citrus packing and distribution

1.10. Citrus marketing and export

Now prepare to role-play the following scenario:

You are having quite a lot of labour problems in terms of late-coming, poor work performance and workers arriving drunk on duty. You decide to consult a labour specialist.

2. Source the best possible expert for your purpose (from a selection of your teammates), and negotiate the professional fees payable.

2.1. Write down key notes on the process you followed to source a specialist.

- 2.2. Explain how you went about negotiating the fees (and how you made sure that you will get the best value for money).

3. Prepare a detailed brief for the specialist (explaining the challenges, as well as your business's objectives in terms of the harnessing of this resource).

4. The specialist will then give advice and guidance. Make notes of the advice given.

5. The specialist will also help you to draft a personal action plan to address the matters and ensure that you take the appropriate action to optimise operations and reach the business objectives. Record key notes on the possible content of this kind of action plan below.

Section 2: Formative Assessment Activities

F263534.1 – Team Discussion, Poster and Class Presentation

- ✓ Work as a team to complete this activity.
- ✓ Time to spend on this activity: 2 hours.

Case study:

Consider the following case in terms of establishing a new orchard on an existing citrus production unit, which your organisation recently purchased:

The cultivars planted are not bearing export quality fruit, and a decision has been made to send it to the juicing factory. You will need to negotiate contracts and logistics for this.

A decision has also been made to establish a new orchard block. It will be established on virgin soils. The decision means extending the irrigation dam and system.

The soil needs to be tested, to ensure it is optimal for the establishment of new trendy cultivars that could yield far higher profits within the next three years.

1. Hold a team discussion to identify all the tasks to be done and the actions to be taken.
2. Now use the following draft format for a checklist and draft a poster with your team's conclusions:

What needs to be done?	Who will do it?	By when?	What is needed?	How will I know when I am done?

3. Now redraft the list and prioritise the tasks from most urgent to least urgent.

What needs to be done?	Who will do it?	By when?	What is needed?	How will I know when I am done?

4. Present your team's poster to the rest of the class.

Explain the following:

4.1. The process you followed to prioritise the tasks.

4.2. Why you decided to prioritise certain tasks over others.

4.3. How you decided on the timeframe allocated in the task list.

4.4. Attach a copy or picture of the team poster here.



F263534.2 – Paired Case Study, Mind Map and Presentation

- ✓ Work in pairs to complete this activity.
- ✓ Time to spend on this activity: 2 hours.

Case study:

You and your partner have decided to start a labour-broking business in your local area. You want to be really professional and your main goal is to become the number one choice employer and labour-broking firm in the province.

Accordingly, you have decided that you need premises in the nearest town. You also intend to have branded vehicles and a website. You want your office to be manned twelve hours a day by a professional receptionist, who can take calls and answer queries. Your aim is to operate 100% within the labour law and you will need legal advice to ensure that your contracts are perfect.

1. Read the case study carefully, and then draft a mind map with all the tasks you and your partner will need to action in order to:
 - 1.1. Establish premises
 - 1.2. Get your communications systems up and running
 - 1.3. Obtain vehicles
 - 1.4. Hire office staff
 - 1.5. Design and establish your brand
 - 1.6. Ensure that you operate within the law

Prepare to present your mind map to the rest of the class by working through the questions below in order to clarify your decision-making process:

2. How did you decide whether you would rent / lease a property or purchase a property for business premises?

3. What would the advantages and disadvantages of renting over buying of property be?

4. Where would your premises ideally be located? Why did you choose this location?

5. What components are included in your communications systems, and why did you choose these components?

6. How do you intend to establish your brand?

7. How will you ensure that your brand is professional at all times?

8. What kinds of legal implications did you take into account when deciding on this kind of business and choice of premises?

9. What other kinds of resources do you think your business needs in order to operate successfully, for example, furniture and stationery?

10. Attach a copy or picture of your mind map here.

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F263534.3 – Paired Research Presentation

- ✓ Work in pairs to complete this activity.
- ✓ You will need to access the internet or visit your local bank to complete this activity.
- ✓ Time to spend on this activity: 1 hour.

Instructions:

Access the internet or visit your local bank to research options for opening a business bank account.

Compare different options and accounts to select the most suitable one for a citrus production business.

1. Prepare to present your research finding to the rest of the class, by working through the following questions:

- 1.1. Which commercial banking brand did you choose? Why?

- 1.2. What other commercial banking options were available to you?

- 1.3. What kind of account would you choose to open? Why?

- 1.4. What other kinds of accounts were available to you? Why did you not choose them?

F263534.4 – Paired Flow Diagram with Key Notes

- ✓ Work as a team to complete this activity.
- ✓ You will need to access the internet or visit your local bank to complete this activity.
- ✓ Time to spend on this activity: 1 hour.

Instructions:

Read all the information in chapter 7 of your learner study guide and then draft a flow diagram with details of all the elements you need to consider and put into place in order to establish a financial and recordkeeping system for a business.

Prepare to present your flow diagram to the rest of the class, by working through the following questions:

1. What elements did you include in your financial system in order to ensure effective financial controls?

2. What kinds of documents / journals are required to eliminate fraud and establish good financial controls for each of the following:

Cash revenue of the business	
Electronic revenues coming into the business	
Petty cash purchases	
Payments for orders and purchases	
Debtors payments	
Creditors payments	
Maintaining cash flow budgets vs actual	

3. What measures should be taken to monitor accounting systems in order to ensure optimal controls and limit chances of fraud?

4. What is the role and importance of auditing systems in terms of financial management?

5. How will you ensure that you screen debtors (people buying on account) prior to doing business with them, in order to guarantee that they are able to pay you on time?

6. Attach a copy of your flow diagram here.

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F263534.5 – Team Risk Management Case Study and Mind Map Presentation

- ✓ Work in pairs to complete this activity.
- ✓ Time to spend on this activity: 2 hours.

Case study:

Business operations come with inherent risks. Consider all the risks involved in the following type of business:

You and your partner have decided to start a labour-broking business in your local area. You want to be really professional and your main goal is to become the number one choice employer and labour-broking firm in the province.

Accordingly, you have decided that you need premises in the nearest town. You also intend to have branded vehicles and a website. You want your office to be manned twelve hours a day by a professional receptionist, who can take calls and answer queries. Your aim is to operate 100% within the labour law and accordingly, you will need legal advice to ensure that your contracts are perfect.

1. Read the case study carefully, now brainstorm to make a list of all the possible risks you might face in terms of this kind of business.

2. Then draft a mind map with key notes about all the tasks you and your partner will need to action in order to:
 - 2.1. Establish a security system
 - 2.2. Establish emergency procedures
 - 2.3. Source insurance cover (short- and long-term)
 - 2.4. Stock your business to start operating
3. Prepare to present your mind map to the rest of the class, by working through the questions below, in order to clarify your decision-making process:
 - 3.1. What kind of security risks did you identify? And what kinds of systems could be put in place to mitigate these risks?

3.2. What kinds of emergencies might occur in this kind of business?

3.3. How could you prepare for emergencies and what kinds of emergency procedures would you implement?

3.4. What assets of the business would need to be insured?

3.5. What kinds of insurance products would be most suitable to cover these assets?

3.6. What kind of stocks would you need to acquire to operate this kind of business?

3.7. How would you ensure that you guard against stock losses?

