



**Australian Government**

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

# **SIRXSRM806 Manage and transform sales and service programs**

**Release: 1**

## **SIRXSRM806 Manage and transform sales and service programs**

### **Modification History**

The version details of this endorsed unit are in the table below. The latest information is at the top.

<b>Release</b>	<b>Comments</b>
First Release	New unit

### **Unit Descriptor**

This unit describes the performance outcomes, skills and knowledge required to identify, analyse and put in place strategies to transform aspects of the business's operations.

The unit addresses the diagnosis of the need for change in order to improve the operations of the business, together with the ability to plan and implement effective new programs and services.

The unit requires the demonstration of effective analytical skills and high-level communication skills, as well as the ability to craft effective solutions and apply specific understanding of retailing.

### **Application of the Unit**

This unit of competency supports the needs of senior managers and business owners who have significant responsibility for driving change and process improvement within a service organisation.

### **Licensing/Regulatory Information**

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

### **Pre-Requisites**

Nil

### **Employability Skills Information**

This unit contains employability skills.

## Elements and Performance Criteria Pre-Content

### Elements and Performance Criteria

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
1. Diagnose need for the transformation program.	<p>1.1. Conduct <b><i>research</i></b> that is internal and external to the organisation to identify opportunities and rationale for transformation within the organisation.</p> <p>1.2. Analyse the organisation's strategic and business plans to ensure potential <b><i>transformational strategies</i></b> are aligned.</p> <p>1.3. Audit <b><i>current performance</i></b> to size the magnitude of the change or transformation that is required to improve organisational performance.</p> <p>1.4. Identify and prioritise change and transformational strategies for action.</p> <p>1.5. Gain authorisation as required for the transformation strategy in line with standard organisational policies and procedures.</p>
2. Prepare a transformation strategy.	<p>2.1. Identify, cost and budget the requirements for human and other resources required to implement the strategy.</p> <p>2.2. Canvass options and solutions to ensure the development of a creative, ethical, integrated and effective transformation strategy.</p> <p>2.3. Conduct and document a risk management analysis leading to the development of <b><i>risk management control</i></b> plans.</p> <p>2.4. Develop, test and prioritise <b><i>strategies to drive change and transformation</i></b> with staff and stakeholders.</p>
3. Analyse barriers to transformation.	<p>3.1. Identify, cost and allocate the resources required to support the implementation of a transformation strategy.</p> <p>3.2. Identify and document skill shortages that may limit capacity to respond to change.</p> <p>3.3. Analyse and manage impacts on existing sales and service delivery that may be generated by the new approach and strategy.</p> <p>3.4. Analyse the <b><i>impact of transformation strategy</i></b> on existing organisational structures and power bases.</p>
4. Implement transformation strategy.	<p>4.1. Identify, secure and brief team members participating in sponsoring and driving the transformation strategy.</p> <p>4.2. Foster the <b><i>skill development</i></b> of staff to lift their individual and</p>

- team performance.
- 4.3. Review and refine the organisation's governance structures to ensure the transformation strategy conforms to legal and organisational requirements.
  - 4.4. Develop and implement processes to communicate the objectives of the desired transformation.
  - 4.5. Develop strategies to build a shared understanding and commitment to change across the organisation or business unit.
  - 4.6. Identify and manage conflict between individuals according to organisational procedures.
5. Evaluate outcomes and review transformation strategy.
    - 5.1. Quantify and analyse outcomes achieved from the implementation of the transformation strategy.
    - 5.2. Quantify and analyse capacity of the transformation strategy to address principles of economic, social and environmental sustainability.
    - 5.3. Analyse and document opportunities for future organisational change, transformation and improvement to inform further planning processes in line with organisational policies and procedures.

## Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

### Required skills

- analytical and problem-solving skills to:
  - identify rationale and need for change and transformation
  - select strategies that best match the organisation's requirements
- literacy skills to prepare complex strategic business reports
- interpersonal skills to:
  - communicate transformation strategy to staff
  - negotiate with and persuade staff to embrace transformation processes
- initiative and enterprise skills to apply lateral and creative thinking to develop strategies to manage transformations
- planning and organising skills to arrange and manage implementation strategies
- technology skills to use computer applications
- time-management skills to plan and prioritise work

### Required knowledge

- business ethics relating to the retail industry
- concepts and models of:
  - change and transformation management
  - leadership and management
  - organisational culture
  - strategic and business planning
- concepts of risk management planning and processes
- governance and accountability models and processes
- impact of organisation's culture on acceptance of change and business transformation
- organisational mission, vision, values and goals
- organisational strategy, policy and procedures relating to business transformation in the retail industry
- principles of economic, environmental and social sustainability

## Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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

Evidence of the following is essential:

- identifies and analyses the need for changed sales and service programs and the opportunities that will be generated
- develops an effective plan for change and transformation, including:
  - mechanisms to overcome barriers to change
  - identification and allocation of resources to meet change requirements
- manages change processes and demonstrates the ability to champion and drive change by engendering support for and commitment to the desired outcomes.

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

Assessment must ensure access to:

- a retail work environment
- a current range of text and online information sources on industry and market intelligence
- current staff skills profile
- recent organisational sales and service performance data
  - relevant organisational financial data
  - information regarding the organisation's current governance structures.

### **Method of assessment**

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- a role play
- answers to questions about specific skills and knowledge
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

### **Guidance information for assessment**

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

## 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. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the individual, accessibility of the item, and local industry and regional contexts) may also be included.

***Research internal and external to the organisation*** may include:

- primary research conducted in-house, including:
  - qualitative research
  - quantitative research
- primary research accessed or commissioned from external sources
- secondary research, including publicly available data accessed through desk-based research
- search of publicly available annual reports for listed companies
- search of publicly available business records.

***Transformational strategies*** to be undertaken can be wide-ranging in nature, of relevance to the organisation and may include:

- addition of a new retail location
- change of sales techniques
- changes to company structures, including trends towards:
  - changed ownerships
  - merged or diversified organisations
  - multi-service organisations
- development of major loyalty program
- establishment of a new business
- introduction of a major new technology to support business operations, including:
  - e-retailing
  - radio frequency identification devices (RFIDs)
  - self-service checkout
  - social networking media as a marketing and sales channel
- new or changing levels and ranges of services and products, including:
  - blurring of product categories (e.g. bookshops with cafes)
  - brand extension
  - customisation of products and services
  - generationally targeted products (e.g. for the over 50s)
- re-orientating retail focus, customer base and goods or services
- repositioning within the marketplace (e.g. to a high end or discount retailer).

***Current performance*** may be assessed by:

- customer satisfaction ratings
- financial analysis using techniques, including:
  - balance sheet analysis

- break even analysis
- cash flow analysis
- cost-benefit analysis
- daily sales and trend analysis
- gross profit
- profit and loss analysis
- return of assets analysis
- return on investment (ROI) analysis
- sales per employee
- sales per square metre of floor space
- sales to inventory ratio
- stock turnover rate
- industry awards received
- mystery shopping reports
- number of business referrals
- performance in industry benchmarking studies
- staff feedback received
- volume of repeat business.
- identifying hazards
- analysing consequences, such as potential injury, property damage, etc.
- assessing risk, including probability, frequency and severity of injury or loss
- determining appropriate action, including methods of removing or reducing risk
- implementing controls, including:
  - redesign
  - removal
  - new methods
  - audit
- evaluating control measures
- recording risk management measures
- setting regular risk management review dates.
- changed decision-making and delegation processes
- changed organisational structure
- changed role responsibilities of staff
- identification of new markets
- identification of new products and services
- reviewed or new planning processes
- reviewed or new work processes.
- Kotter: eight steps to successful change

***Risk management control plans*** are developed using a structured process that may include:

***Strategies to drive change and transformation*** may include:

***Impact of***



***transformation strategy*** • Lewin: change model  
may be analysed by • Prosci: ADKAR model  
reference to theories that • Kruger: Change Management Iceberg.  
may include:

***Skill development*** • analysing sales and other statistics  
required by staff to foster • area management  
transformation may • building rapport with customers  
include: • language and literacy  
• motivating colleagues  
• planning skills  
• product knowledge  
• strengthened:  
• sales skills  
• reporting skills  
• technology skills  
• crafting of solutions for customers  
• provision of feedback  
• team management.

## **Unit Sector(s)**

Cross-Sector

## **Competency Field**

Retail Management