SIRXSRM808 Plan and manage complex retail projects

Release: 1

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Modification History

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

Release	Comments
First Release	New unit

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to identify, plan, control and finalise complex projects within a retail environment.

The unit covers the management of projects of significant scope and duration, for example, the development and implementation of major new infrastructure, brands or services.

The unit requires the demonstration of project management skills and knowledge with the application of specific retailing understanding.

Application of the Unit

This unit of competency supports the needs of senior managers and business owners with significant responsibility for implementing and managing a major and complex project within a retail 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. Identify opportunities for project development.	1.1. Consult with staff, business owners and industry experts to evaluate business opportunities that may identify potential new *projects*.
	1.2. Review and analyse the organisation's strategic and business plans to ensure congruence with the potential project.
	1.3. Research *best practices and trends* within the service industry.
	1.4. Collect and analyse demographic and trend data to provide profiling information about the organisation's customer base.
	1.5. Collect and analyse *industry intelligence* into the strengths and weaknesses of competitors.
	1.6. Analyse the strengths, weaknesses, opportunities and threats (SWOT) of the organisation and its environment.
	1.7. Develop a proposal for the project and negotiate authorisation as required in line with standard organisational policies and procedures.
2. Prepare the project plan.	2.1. Define and document project *specifications and terms of reference*.
	2.2. Develop a detailed project budget that will enable management of all aspects of the project during implementation.
	2.3. Develop and document timelines, schedules and critical path for the project, taking into consideration contingencies and planning for time slippages.
	2.4. Identify and secure the people with the required skills to contribute to the completion of the project within the required timeframe.
	2.5. Identify, cost and negotiate access to the *physical resources* required for completion of the project.
	2.6. Identify, cost and negotiate access to *subcontractors, consultants and external professionals* required for completion of the project.
	2.7. Conduct and document a risk management analysis leading to the development of *risk management control plans*.
	2.8. Finalise and gain sign-off where required of project plan in line

with standard organisational policies and processes.

3. Establish communication and reporting processes.	3.1. Brief project team members regarding the project, their roles, levels of delegated responsibility and the outcomes to be achieved.
	3.2. Establish two-way communication processes to coordinate work, gather data to monitor project performance, and inform team members of progress.
	3.3. Establish and communicate clear reporting processes for those involved in the project's implementation.
4. Manage the project.	4.1. Monitor project progress according to project plan requirements, using appropriate *project management tools* and methodologies.
	4.2. Support and manage team members to achieve their required targets and key performance indicators, as identified in the project plan.
	4.3. Make amendments, changes and additions to the project plan in light of changing circumstances to ensure project aims and outcomes are met.
	4.4. Monitor, review and adjust resourcing to support the project to reflect changing circumstances.
	4.5. Report overall project progress to senior managers or business owners as required and in line with the project plan.
5. Finalise the project.	5.1. Document project outcomes and report to senior management or business owners as required, following standard organisational policies and processes.
	5.2. Provide effective and documented handover instructions and advice to staff responsible for the ongoing implementation or maintenance of project products or services in line with organisational procedures.
	5.3. Debrief project team members and relevant stakeholders about the conduct and outcomes of the project.
	5.4. Prepare a final report analysing the strengths and weaknesses of the project plan and the conduct of the project.

Required Skills and Knowledge

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

Required skills

- communication and interpersonal skills to:
    - consult stakeholders
    - negotiate resources required for project implementation
- literacy and numeracy skills to:
    - prepare complex business analyses and reports
    - research best practice in the retail industry
    - to set budgets and manage financials
- planning and organising skills to:
    - conduct risk-management planning
    - manage staff
    - plan and manage complex projects
- problem-solving and analytical skills to:
    - analyse retail industry market intelligence
    - evaluate business opportunities for new projects
    - exercise judgement and decision making in selecting projects and implementation strategies
- technology skills to use computer software functions, including project management software

Required knowledge

- budgets and financial planning and monitoring
- concepts of risk management planning and processes
- current and emerging trends in the retail industry
- tools and models of project management
- reporting mechanisms

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:

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- applies:
    - project management skills required for the successful implementation of a complex retail project
    - planning and management skills to design, resource and schedule a complex retail project
    - risk-management principles and processes
- implements and finalises a project, reflecting the ability to respond to changing and emerging requirements and contingencies.

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
    - relevant best practice and trends
- industry consultants and external professionals
- a project team
- project management tools
- business owners or senior management.

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.

Project to be undertaken can be wide-ranging in nature, of relevance to the organisation, and may include:	• adding a new retail location • changing manufacturer or supplier • establishing new business • introducing major new technology to support business operations • relocating retail premises • re-orientating retail focus, customer base and goods or services.

Best practices and trends may include:	• emerging or changed use of technologies, including:
	  • e-retailing
	  • radio frequency identification devices (RFIDs)
	  • self-service checkout
	  • social networking media as a marketing and sales channel
	• company structures, including trends towards:
	  • changed ownerships
	  • merged or diversified organisations
	  • multi-service organisations
	• 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)
	  • polarisation of cost of goods (focus on high end and discount).

Industry intelligence may include:	• data available from industry associations • information gained through industry networks • market research, including mystery shopping • published reports on industry composition • search of publicly available annual reports for listed companies • search of publicly available business records.

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Specifications and terms of reference may include:	• definition of the project aims
	• description of the outcomes to be achieved using, wherever possible, the nomination of clear metrics
	• description of all stakeholders
	• description of project parameters, including:
	  • scope of operations
	  • flexibilities involved
	• identification of the budget
	• specification of the timescale
	• specification of the communication strategy to be used.

Physical resources may include:	• computer facilities • delivery vehicles • fittings and fixtures • office premises • retail premises • warehouses.
Subcontractors, consultants and external professionals may include:	• accountants • lawyers • marketing experts • real estate consultants • retail specialist advisers • store fit-out experts.

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

Project management tools typically will be computer-based and may:	• be in-house or proprietary software • incorporate the use of Gantt or PERT charts • incorporate scheduling and reporting templates • use critical path analysis.

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Unit Sector(s)

Cross-Sector

Competency Field

Retail Management