



Australian Government

Department of Education, Employment and Workplace Relations

SIRXMG005A Set strategic plans

Revision Number: 2

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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
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop strategic plans.

Application of the Unit

This unit applies to senior managers who are responsible for setting objectives and targets both long-term and short-term, and developing action plans consistent with the store's overall aims and objectives.

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

Elements

Elements describe the essential outcomes of a unit of competency.

1. Communicate and implement mission statement.

2. Set objectives and targets.

3. Develop action plans

Performance Criteria

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.

1.1. Communicate ***mission statement***, according to store's stated purpose and values.

1.2. Interpret mission statement in active consultation with ***team members and management***.

2.1. Develop objectives and targets after active consultation with team members and management according to ***store policy and procedures***.

2.2. Ensure ***strategies and objectives*** accurately reflect the overall ***store mission and values***.

2.3. Ensure strategies and objectives are attainable, cost-efficient and realistic within a designated timeframe and allow for continuous improvement planning.

2.4. Ensure strategies and objectives contain sufficient detail to allow development of specific projects.

2.5. Clearly acknowledge ***constraints upon objectives***.

3.1. Develop, evaluate and implement action plans according to store policy and procedures.

3.2. Ensure action plans contain, clear, comprehensive and concise details.

3.3. Ensure action plans take account of appropriate operational and other relevant considerations.

3.4. Ensure proposals identify targets, standards and implementation methods.

Required Skills and Knowledge

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

Required skills

- analytical and management skills to implement and evaluate plans
- interpersonal communication skills to:
 - interpret and communicate mission statement
 - develop objectives and targets in consultation with team members and management through clear and direct communication
 - ask questions to identify and confirm requirements
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication
 - present reports
 - conduct group presentations
 - conduct consultative processes
- literacy skills to:
 - document strategic plans
 - interpret information
- numerical skills in regard to financial and budget planning

Required knowledge

- store policy and procedures in regard to strategic planning
- store purpose and values
- store mission statement
- internal and external operating environment
- principles and techniques in strategic planning

Evidence Guide

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

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

Evidence of the following is essential:

- interprets, communicates and implements store's mission statement
- collaboratively develops team objectives reflecting the store's mission statement
- collaboratively develops strategies for achieving team objectives
- collaboratively develops effective action plans to implement strategies, including targets, standards and implementation methods.

Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- relevant documentation, such as:
 - strategic plans
 - store mission statement
 - store value statement
- information on the internal and external operating environment
- a team.

Methods 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
- third-party reports from a supervisor
- research reports
- written or verbal questioning to assess knowledge and understanding
- 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 in the performance criteria is detailed below.

Mission statements may be:

- formal
- informal
- communicated verbally
- communicated in writing.

Team members and management may include:

- people with varying degrees of language and literacy
- people from a range of cultural, social and ethnic backgrounds
- people with a range of responsibilities and job descriptions.

Store policy and procedures in regard to:

- strategic planning

Strategies and objectives may relate to:

- technology
- time management
- standards of work
- quality
- quantity
- human relations, personal development
- legal issues
- internal and external operating environments
- implementation of policy and procedures
- development and communication of ideas
- development of product and service provision
- problem solving
- financial control and accounting
- profits
- management systems
- inventory control
- loss prevention.

Store mission and values may include:

- customer relationships
- supplier relationships
- legal requirements
- WHS
- equal opportunity

- ethics
- employment
- human relations
- training
- environment.
- internal considerations
- external considerations.

Constraints upon objectives may include:

Unit Sector(s)

Cross-Sector

Competency field

Management and Leadership