

**RETAIL CHAIN STORE MANAGER**

**Aligned with Qualification 103150 Retail Chain Store Manager**

**WORK EXPERIENCE LOG**

**Retail chain store manager**

**Curriculum 142103001**

**Work experience**

142103001-WM-01 Processes and procedures for planning and implementing retail chain store operations (9 credits)

142103001-WM-02 Processes and procedures for leading teams in a retail chain store environment, (8 credits)

142103001-WM-03 Processes and procedures for managing retail chain store service standards (8 credits)

142103001-WM-04 Processes and procedures for maintaining effective retail chain store stakeholder relations (4 credits)

142103001-WM-05 Processes and procedures for managing stock levels and influencing store range and layout (8 credits)

142103001-WM-06 Processes and procedures for improving the retail chain store’s bottom line (8 credits)

142103001-WM-07 Processes and procedures for managing sales and promotional activities (6 credits)

142103001-WM-08 Processes and procedures for managing risk and maintaining assets in a retail chain store (8 credits)

|  |  |
| --- | --- |
| Company |  |
| Learner name & surname |  |
| Learner ID number |  |
| Learner signature |  |
| Line manager name & surname |  |

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| 1 Occupational profile |

## 1.1 Occupational purpose

The purpose of this qualification is to equip a learner with the knowledge, skills and competencies to perform duties as a Retail Chain Store Manager.

A Retail Chain Store Manager manages the functions of a branch of a retail chain organisation.

A qualified learner will be able to:

* Lead teams to achieve retail chain store operational objectives.
* Manage service standards of a retail chain store.
* Manage stock control in a retail chain store.
* Improve the financial performance of a retail chain store.

## 1.2 Occupational task details

1. Manage service standards of a retail chain store (NQF Level 5)

*Unique Product or Service:* Service compliant to standards

Occupational Responsibilities:

* Manage retail chain store service standards
* Maintain retail chain store stakeholder relations

Occupational Contexts:

* Processes and procedures for managing retail chain store service standards
* Processes and procedures for maintaining retail chain store stakeholder relations

2. Manage stock control in a retail chain store (NQF Level 5)

*Unique Product or Service:* Required stock levels on hand

Occupational Responsibilities:

* Manage stock control in a retail chain store
* Propose improvements to a retail chain store’s range and layout

Occupational Contexts:

* Processes and procedures for placing orders and influencing store range and layout

3. Lead teams to achieve retail chain store operational objectives (NQF Level 5)

*Unique Product or Service:* Motivated and productive employees

Occupational Responsibilities:

* Manage retail chain store employee performance
* Manage retail chain store operational processes

Occupational Contexts:

* Processes and procedures for planning and implementing retail chain store operations
* Processes and procedures for leading teams in a retail chain store environment

4. Improve the financial performance of a retail chain store (NQF Level 5)

*Unique Product or Service:* Improved financial contribution to the organisation

Occupational Responsibilities:

* Implement plans to improve sales in a retail chain store
* Implement plans to improve a retail chain store’s financial performance
* Manage risk and maintain assets in a retail chain store

Occupational Contexts:

* Processes and procedures for improving the retail chain store’s bottom line
* Processes and procedures for managing sales and promotional activities
* Processes and procedures for managing risk and maintaining assets in a retail chain store

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| 2 Purpose of the work experience modules |

1. **142103001-WM-01 Processes and procedures for planning and implementing retail chain store operations**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to planning and implementing retail chain store operations.

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 11 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-01-WE01: Plan daily and weekly operations
* WM-01-WE02: Hold operational meetings

1. **142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to leading teams in a retail chain store environment

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 10 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-02-WE01: Lead teams to achieve operational objectives
* WM-02-WE02: Improve staff performance
* WM-02-WE03: Induct a new staff member into the store

1. **142103001-WM-03, Processes and procedures for managing retail chain store service standards**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to managing retail chain store service standards.

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 10 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-03-WE01: Manage health, safety and housekeeping
* WM-03-WE02: Manage customer shopping experience

1. **142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to for maintain retail chain store stakeholder relations

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 5 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-04-WE01: Maintain or build effective internal stakeholder relations
* WM-04-WE02: Maintain or build effective external stakeholder relations

1. **142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to placing orders and influencing store range and layout

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 10 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-05-WE01: Manage stock balances
* WM-05-WE02: Manage stock levels
* WM-05-WE03: Propose range and layout improvement

1. **142103001-WM-06, Processes and procedures for improving the retail chain store’s bottom line**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to improving the retail chain store’s bottom line

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 8 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-06-WE01: Analyse store performance reports
* WM-06-WE02: Plan and implement actions to improve the store performance

1. **142103001-WM-07, Processes and procedures for managing sales and promotional activities, NQF Level 5, Credits 6**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to managing sales and promotional activities

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 7 days.

The Work Experience modules can be completed at the same time

The learner will be required to:

* WM-07-WE01: Manage sales activity
* WM-07-WE02: Implement promotional activity

1. **142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store**

The focus of the work experience is on providing the learner an opportunity to:

* Gain exposure to managing risk and maintaining assets in a retail chain store

The Learner will be required to successfully complete each Work Experience module for at least 5 months under supervision before operating for 1 months independently.

Learning contract time, the total amount of time during which the learner needs to have access to the workplace to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) is 10 days.

The Work Experience modules can be completed at the same time.

The learner will be required to:

* WM-08-WE01: Identify and manage areas of risk
* WM-08-WE02: Maintain assets

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| 3 List of workplace skill module specifications |

* 142103001-WM-01 Processes and procedures for planning and implementing retail chain store operations (9 credits)
* 142103001-WM-02 Processes and procedures for leading teams in a retail chain store environment, (8 credits)
* 142103001-WM-03 Processes and procedures for managing retail chain store service standards (8 credits)
* 142103001-WM-04 Processes and procedures for maintaining effective retail chain store stakeholder relations (4 credits)
* 142103001-WM-05 Processes and procedures for managing stock levels and influencing store range and layout (8 credits)
* 142103001-WM-06 Processes and procedures for improving the retail chain store’s bottom line (8 credits)
* 142103001-WM-07 Processes and procedures for managing sales and promotional activities (6 credits)
* 142103001-WM-08 Processes and procedures for managing risk and maintaining assets in a retail chain store (8 credits)

**One credit equals 10 hours of workplace experience.**

**Practical, workplace-contextualised knowledge and experience needs to be documented in a log sheet, which should be signed off by the line manager.**

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| 4 Physical requirements for workplace experience |

* A minimum of 5 separately trading stores in separate locations with a central Head Office.
* Documented in-store policies and procedures.

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| 5 Contextualised workplace knowledge |

The line manager will need to ensure that the learner is provided with the following knowledge so that learning can be contextualised.

|  |  |  |
| --- | --- | --- |
| **Contextualised Knowledge** | **Date** | **Signature of line manager** |
| **Knowledge module 1: Processes and procedures for planning and implementing retail chain store operations** | | |
| Organisational methods, policies and procedures for scheduling staff |  |  |
| Organisational policies and procedures for holding in-store operational meetings |  |  |
| Organisational policies and procedures for planning and scheduling operational tasks |  |  |
| Organisational policies and procedures for recording minutes of operational in-store meetings |  |  |
| **Knowledge module 2: Processes and procedures for leading teams in a retail chain store environment** | | |
| Organisational policies and procedures for motivating store staff |  |  |
| Organisational policies and procedures for managing staff |  |  |
| The organisation’s informal disciplinary procedure |  |  |
| The organisation’s formal disciplinary procedures |  |  |
| Organisational policies and procedures for counselling staff |  |  |
| The organisation’s performance management policies and procedures |  |  |
| Organisational policies and procedures for inducting store staff |  |  |
| The organisation’s forms to be completed when inducting a staff member into a store |  |  |
| **Knowledge module 3: Processes and procedures for managing retail chain store service standards** | | |
| Organisational health, safety and housekeeping standards, policies and procedures |  |  |
| Organisation’s standards for customer service |  |  |
| Organisational policies and procedures for resolving customer queries and complaints |  |  |
| **Knowledge module 4: Processes and procedures for maintaining effective retail chain store stakeholder relations** | | |
| Organisational strategy in dealing with the various external stakeholders |  |  |
| Organisational policies and procedures for dealing with internal stakeholders |  |  |
| **Knowledge module 5: Processes and procedures for managing stock levels and influencing store range and layout** | | |
| Organisational in-store operational processes that impact on stock on hand balances |  |  |
| Organisational policies and procedures for all operational processes that impact on stock on hand balances |  |  |
| Organisational policies and procedures for the ordering of stock in store |  |  |
| Organisational policies and procedures for clearing overstocks and obsolete stock |  |  |
| Organisational policies and procedures for reducing stock shortages |  |  |
| Organisational policies and procedures for laying out and merchandising stores |  |  |
| Organisational policies and procedures for proposing changes to store layouts and ranges |  |  |
| The organisation’s in store stock management reports |  |  |
| **Knowledge module 6: Processes and procedures for improving the retail chain store’s bottom line** | | |
| The organisation’s store financial reports |  |  |
| Organisational policies and procedures for the analyses of store financial reports |  |  |
| Organisational policies and procedures for increasing sales and Gross Profit |  |  |
| Organisational policies and procedures for reducing expenses |  |  |
| **Knowledge module 7: Processes and procedures for managing sales and promotional activities** | | |
| Organisational policies and procedures for breaking monthly sales targets into daily and weekly targets |  |  |
| Organisational policies and procedures for allocating sales target to departments or categories |  |  |
| Organisational policies and procedures for promoting sales in store |  |  |
| Organisational policies and procedures for notifying promotional activity |  |  |
| Organisational policies and procedures for building promotional displays |  |  |
| Organisational policies and procedures for ticketing promotional displays |  |  |
| Organisational policies and procedures for maintaining promotional display standards throughout the life of a promotion |  |  |
| **Knowledge module 8: Processes and procedures for managing risk and maintaining assets in a retail chain store** | | |
| Areas of risk in the store |  |  |
| Organisational procedures and reports used to identify products at risk in the store |  |  |
| Organisational policies and procedures for minimising risk |  |  |
| The organisation’s asset register and policies and procedures for controlling assets |  |  |
| Store’s assets under maintenance contract |  |  |
| Organisational policies and procedures for managing store assets under maintenance contract |  |  |
| Organisational policies and procedures for maintaining and repairing store assets not under maintenance contract |  |  |
| Organisational policies and procedures for calling in of repair agents |  |  |
| Organisational policies and procedures for completing of documentation for asset maintenance |  |  |
| Organisation’s policy and procedures for the handling of internal theft |  |  |
| Organisational policies and procedures for handling of shoplifting incidents |  |  |

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| 6 Workplace experience |

**1. 142103001-WM-01: Processes and procedures for planning and implementing retail chain store operations (9 credits)**

**1.1 WM-01-WE01: Plan daily and weekly operations**

**1.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Compile at least 14 daily operational plans for different days that take into account peak and off peak days |  |  |  |
| WA0102 Compile at least five weekly operational plans |  |  |  |
| WA0103 Schedule staff to complete task within timeframes according to schedules compiled |  |  |  |
| WA0104 Implement and adjust plans as required to complete required tasks within required timeframes |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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### 1.1.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 Copies of the 14 daily operational plans showing staff scheduled to complete them |  |  |  |
| SE0102 Copies of the 5 weekly operational plans showing staff scheduled to complete them |  |  |  |
| SE0103 Documentary evidence from the learner’s superior detailing the learner’s success in implementing operational plans and achieving operational goals |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**1.2. WM-01-WE02: Hold operational meetings**

**1.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Participate constructively in at least five operational meetings in the retail chain store |  |  |  |
| WA0202 Hold at least 10 operational meetings |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 1.2.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 A report compiled by the learner reflecting his/her participation in and contribution to operational meetings, signed by the learner's superior |  |  |  |
| SE0202 Agendas, notes and action lists arising from operational meetings held by the learner reflecting a range of issues and how they were dealt with signed by the learner’s superior |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**2. 142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment (8 credits)**

**2.1. WM-02-WE01: Lead teams to achieve operational objectives**

**2.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Motivate a team to achieve operational objectives |  |  |  |
| WA0102 Organise and control the work of a team to achieve operational objectives and standards |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 2.1.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 Documented evidence detailing how the learner went about motivating the members of the team to achieve operational objectives |  |  |  |
| SE0102 Documented evidence detailing how the learner organised the members of the team and controlled their work to ensure the achievement of operational objectives and standards within required timeframes |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**2.2. WM-02-WE02: Improve staff performance**

**2.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Successfully resolve problems for at least two different performance issues |  |  |  |
| WA0202 Participate in disciplinary processes including counselling, disciplinary investigations, corrective action processes, disciplinary hearings |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 2.2.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 Notes compiled by the learner explaining what performance issues were resolved and how this was done signed by the learner’s superior |  |  |  |
| SE0202 Disciplinary records and minutes reflecting the learner's participation in and contribution to all disciplinary processes in accordance with company procedure |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**2.3. WM-02-WE03: Induct a new staff member into the store**

**2.3.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0301 Plan the induction of at least two employees |  |  |  |
| WA0302 Conduct the induction of at least two employees |  |  |  |
| WA0303 Complete and check the documentation for a new employee prior to forwarding to head office |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 3.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0301 The plan details all topics to be covered and details what store management must do and allocates experience staff in store to perform other required tasks |  |  |  |
| SE0302 Documented evidence by the learner signed by the staff member inducted detailing the process followed by the learner and staff member new to the store |  |  |  |
| SE0303 Copies of documentation completed and checked by the learner signed off by the learners superior |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**3. 142103001-WM-03, Processes and procedures for managing retail chain store service standards (8 credits)**

**3.1. WM-03-WE01: Manage health, safety and housekeeping**

**3.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Evaluate daily and weekly health, safety and housekeeping activities for a period of three months and identify areas not up to standard |  |  |  |
| WA0102 Compile at least three action plans to improve the health, safety and housekeeping of the store |  |  |  |
| WA0103 Manage relevant health, safety and housekeeping activities in the retail chain store for at least two month |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 3.1.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 Evaluation reports/checklists completed by the learner along with recommendations made by the learner that are appropriate to addressing the improvements needed, signed by the learner's superior |  |  |  |
| SE0102 Action plans compiled by the learner to raise health, safety and housekeeping standards to the required standards of the store |  |  |  |
| SE0103 Documentary evidence of the learner having managed health, safety and housekeeping to required standards for two months |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**3.2. WM-03-WE02: Manage health, safety and housekeeping**

**3.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Develop a checklists to evaluate all points that impact on the customer’s perception of the organisation |  |  |  |
| WA0202 Complete a minimum of 5 checks to evaluate the customer shopping experience and identify areas not up to standard |  |  |  |
| WA0203 Develop action plans to improve shortfalls in service delivery identified on the 5 checks completed |  |  |  |
| WA0204 Participate in and manage the resolution of customer queries and complaints for a period of two months |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 3.2.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 Checklist created to evaluate all areas of customer service within the store signed off by the learner’s superior confirming all areas are included |  |  |  |
| SE0202 5 completed checks evaluating service levels in the store and identifying areas for improvement |  |  |  |
| SE0203 5 action plans developed to improve the shopping experience for the customer |  |  |  |
| SE0204 Action plans and implementation reports that reflect the learner's ability to identify customer service shortfalls and the ability to make the necessary improvements |  |  |  |
| SE0205 Records of at least 10 customer queries and 3 complaints and their resolutions as handled by the learner and signed by the learner’s superior |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**4. 142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations (4 credits)**

**4.1. WM-04-WE01: Maintain or build effective internal stakeholder relations**

**4.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Evaluate the performance of at least 3 stakeholders within the organisation |  |  |  |
| WA0102 Build or maintain effective relations with at least one internal stakeholder |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 4.1.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 The reports accurately details the performance of the internal stakeholders and is signed off by the learner’s superior |  |  |  |
| SE0102 Documentary evidence detailing the steps taken by the learner to build or maintain effective relations with the internal stakeholder |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**4.2. WM-04-WE02: Maintain or build effective external stakeholder relations**

**4.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Evaluate the performance of at least 2 stakeholders external to the organisation |  |  |  |
| WA0202 Build or maintain effective relations with at least one external stakeholder |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### 4.2.2. Supporting evidence to be provided

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 The report accurately details the performance of the 2 external stakeholders and is signed off by the learner’s superior |  |  |  |
| SE0202 Documentary evidence detailing the steps taken by the learner to build or maintain effective relations with an external stakeholder |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5. 142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout (8 credits)**

**5.1. WM-05-WE01: Manage stock balances**

**5.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Prepare or use an organisational checklist detailing all in store operational processes that impact on correct stock on hand balances |  |  |  |
| WA0102 Evaluate the in store processes impacting on stock on hand balances at least once a month for 3 months and take corrective action where standards are not being met. |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5.1.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 The checklist details all in-store operational processes including the receiving and dispatch of stock, stock counts and recording of sales and returned merchandise |  |  |  |
| SE0102 Documented evidence showing that the learner has checked all these in store processes monthly for 3 months and taken action to correct processes where they have not been followed correctly and accurately signed by the learner’s superior |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5.2. WM-05-WE02: Manage stock levels**

**5.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Order stock across a variety of categories for at least four months |  |  |  |
| WA0202 Identify and take action to clear obsolete stock and over stocks monthly for at least 4 months |  |  |  |
| WA0203 Identify stock shortages and take corrective action to reducer stock shortages fortnightly for at least four month |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5.2.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 Copies of orders placed by the learner and documentary evidence showing how these order were calculated |  |  |  |
| SE0202 Documentary evidence listing identified products, the calculations to determine the obsolete and excess stock and the action taken to clear the identified stock |  |  |  |
| SE0203 Documentary evidence listing identified shortage of stock and the action taken to reduce the stock shortage situation |  |  |  |
| SE0204 Report by the learner’s superior detailing the accuracy of the learner’s calculations, orders and success of actions taken |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5.3. WM-05-WE03: Propose range and layout improvement**

**5.3.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0301 Identify improvements to range to increase store sales |  |  |  |
| WA0302 Identify changes to store layout to promote sales and improve store margins |  |  |  |
| WA0303 Write a motivation to Head Office to make the identified changes to range and layout |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**5.3.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0301 Documentary evidence showing that the proposed changes to the store range could have the effect of improving sales |  |  |  |
| SE0302 Documentary evidence showing that the proposed changes to the store layout could have the effect of improving the sales of high margin products |  |  |  |
| SE0303 Copy of the motivation written by the learner showing the correct use of terminology and giving sound evidence that the proposals could improve the store’s sales and margins |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**6. 142103001-WM-06, Processes and procedures for improving the retail chain store’s bottom line (8 credits)**

**6.1. WM-06-WE01: Analyse store performance reports**

**6.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Analyse 4 months sales and expenses to budget and previous year’s actual sales |  |  |  |
| WA0102 Identify all areas of sales and expenses that require action to improve |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**6.1.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 4 Store performance reports along with the learner’s analyses and identification of entries that need to be improved |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**6.2. WM-06-WE02: Plan and implement actions to improve the store performance**

**6.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Draw up an action plan to improve entries identified on the 4 store performance reports |  |  |  |
| WA0202 Evaluate success of the 4 action plans implemented based on the following few month’s reports |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**2.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 The action plan developed and implemented by the learner |  |  |  |
| SE0202 Documentary evidence proving the learner implemented the action plan |  |  |  |
| SE0203 Documentary evidence evaluating the success of the 4 action plans based on attached financial performance reports for the 3 months following the implementation of the action plan |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**7. 142103001-WM-07, Processes and procedures for managing sales and promotional activities (6 credits)**

**7.1. WM-07-WE01: Manage sales activity**

**7.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Break 3 monthly sales budgets into weakly targets per department or category |  |  |  |
| WA0102 Meet with staff and allocate targets to staff members and motivate them to achieve targets |  |  |  |
| WA0103 Evaluate the department’s or category’s actual achievement to target and meet with staff members and provide feedback on achievement for the three months |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**7.1.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 Monthly sales budget along with calculations and breakdown for weeks of the month and targets set per department or category |  |  |  |
| SE0102 Agenda and attendance register showing details of meetings of those sales staff that attended |  |  |  |
| SE0103 Documentary evidence detailing the learner’s ability to motivate sales team to achieve sales targets |  |  |  |
| SE0104 Documentary evidence showing targets and achievements by sales team and learner’s evaluation of their achievements |  |  |  |
| SE0105 Agenda and attendance register showing details of meeting with the sales team to give feedback on sales achieved to targets set. |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**7.2. WM-07-WE02: Implement promotional activity**

**7.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Implement at least three in-store promotional activities |  |  |  |
| WA0202 Manage the display of at least three promotional activities |  |  |  |
| WA0203 Manage the displays and stock throughout the period of the three promotions |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**7.2.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 Photographs of the promotional activities implemented by the learner and confirmed by the learner’s superior that they meet organisational standards |  |  |  |
| SE0202 Report by the learner detailing the process followed to manage the implementation of the three promotions |  |  |  |
| SE0203 Report by the learner’s superior confirming the manner in which the displays were managed throughout their lifespan and that they met organisational standards |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**8. 142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store (8 credits)**

**8.1. WM-08-WE01: Identify and manage areas of risk**

**8.1.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0101 Design or use an organisational checklist to evaluate the areas of risk in the store once a month for two months |  |  |  |
| WA0102 Design or use an organisational checklist to evaluate the potential for shrinkage and losses once a month for 3 months |  |  |  |
| WA0103 Identify products susceptible to theft in the store |  |  |  |
| WA0104 Develop and implement an action plan to minimise shrinkage and losses in the store |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**8.1.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0101 The checklist signed off as being a complete list of areas of risk by the learner’s superior |  |  |  |
| SE0102 The checklist signed off as being a complete list of areas of potential shrinkage by the learner’s superior |  |  |  |
| SE0103 Documentary evidence showing the evaluation of all areas of risk and shrinkage in the store and highlighting where action is required to reduce the chance of losses occurring for the 3 months completed |  |  |  |
| SE0104 Stock reports and their analyses identifying products being stolen in the store |  |  |  |
| SE0105 The action plan developed by the learner |  |  |  |
| SE0106 Evaluation by the learner’s superior on the checklists completed, areas identified for improvement and the success of the action plans implemented by the learner |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**8.2. WM-08-WE02: Maintain assets**

**8.2.1 Statement of workplace experience**

The employee engaged in the following work activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Work experience activities** | **Yes** | **No** | **Notes** |
| WA0201 Record the maintenance of 3 assets under maintenance contract |  |  |  |
| WA0202 Plan, implement and record the maintenance or repair of 2 assets not under maintenance contract |  |  |  |
| WA0203 Compile and implement a maintenance schedule for the assets at a department |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**8.2.2. Supporting evidence to be provided**

The following evidence is required

|  |  |  |  |
| --- | --- | --- | --- |
| **Supporting evidence** | **Yes** | **No** | **Notes** |
| SE0201 Copies of the organisation’s records for the maintenance of the 3 assets under maintenance contract completed by the learner |  |  |  |
| SE0202 Copies of the organisation’s records for the maintenance of the 2 assets not under maintenance contract completed by the learner |  |  |  |
| SE0203 The maintenance schedule completed and implemented by the learner |  |  |  |
| SE0204 Documentary evidence by the learner’s superior confirming the maintenance schedule compiled by the learner met requirements and was implemented according to organisational standards |  |  |  |
| Manager Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date  \_\_\_\_\_\_\_\_\_\_\_\_\_ | | Learner Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |