



# **Wholesale & Retail**

## **LEADERSHIP CHAIR**



Cape Peninsula  
University of Technology



*“Collaboration opens the window  
to a world of opportunities.”*

**Project 2015/15:**

**A model to operate and use a retail store  
for workplace experience and research on  
the Cape Peninsula University of  
Technology campus in Cape Town**

March 2016

## **ANNEXURES**

APPLIED RESEARCH  
LEADERSHIP DEVELOPMENT  
SERVICE TO RETAIL COMMUNITY

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**ANNEXURE A:**

**Interview schedule for retailers**

## ANNEXURE A

### Interview schedule for retailers

#### Research Title:

A model for workplace experience, research and the operations of a retail store on CPUT campus in Cape Town.

Your opinion on the following issues will be required:

#### **Deliverable 3**

You have already indicated an interest in participating in a Retail Lab (Store/ Department/ Mall) on the CPUT campus.

1. What are your perceptions of how this Retail Lab should function?
  - a. Comment on finances - who should pay for what,
    - i. how will invoicing work,
    - ii. how tills will work, till software,
    - iii. should you pay to participate, etc.
    - iv. Do you understand that this is not about profit but about training?
  - b. Facility designs - basically the designs in Petrus slides?
    - i. Which are preferred and why?
    - ii. Which is a non-starter and why?
    - iii. Do they meet minimum space needed?
    - iv. How do you feel about competing with the same products alongside a competitor?
    - v. Are there any problems that you envisage and how would you overcome them?
2. What services and products would you offer?
  - a. What range would you offer?
  - b. How would you handle common brands?
  - c. Should you only have house brands, etc
3. Responsibilities – What should retailers be responsible for and what should CPUT be responsible for?
  - a. Who will manage each mini store (retail person on site?) Should there be a CPUT “manager”?
  - b. Ordering?
  - c. Theft/losses?
  - d. “Employ” and pay learners?
4. How do you envisage WIL (work integrated learning) in your store/ space/ department within the Retail Lab?
  - a. what will learners do,
  - b. how many at one time for how long, and thus how many each mini store can cover in a year,
  - c. who will complete/sign logbook
5. How can the “store” be managed and run so that all stakeholders (who are they?) are involved?
6. What are your concerns? General, open ended

**Deliverable 2**

1. List the various possibilities for retailers to use the store for researching customers and retail practices. Basically, would you be happy for the “store” to be used by people (including themselves) doing research such as surveys, playing around with, price location on shelf, shelf advertising, etc to see effect on retail sales
2. Do you see it as feasible to use it as a research laboratory, and if so what type of research may be done – would want to refer this to your marketing department?

**ANNEXURE B:**

**Sum up questionnaire for retailers**

## ANNEXURE B

### Sum up questionnaire for retailers

#### A model for workplace experience and the operations of a retail store on the CPUT campus in Cape Town

You have already indicated an interest in participating in a Retail Lab (Store/ Department/ Mall) on the CPUT campus. This is a sum up of our discussion a short while ago. Please write in point form your **opinion** on the following issues:

<b>1. What are your perceptions of how this Retail Lab should function?</b>	
a.	<p>Comment on finances - who should pay for what.</p> <p>i. How will invoicing work?</p> <p>ii. How tills will work, till software?</p> <p>iii. Should you pay to participate?</p>
b.	<p>Facility designs - basically the designs in slides. Refer to attached doc.</p> <p>i. Which are preferred and why?</p> <p>ii. Which is a non-starter and why?</p> <p>iii. Do they meet minimum space needed?</p> <p>iv. How do you feel about competing with the same products alongside a competitor?</p> <p>v. Are there any problems that you envisage and how would you overcome them?</p>

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**2. What services and products would you offer?**

a. What range would you offer?

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b. How would you handle common brands?

--	--

c. Should you only have house brands?

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**3. Responsibilities – What should retailers be responsible for and what should CPUT be responsible for?**

a. Who will manage each mini store (retail person on site?) Should there be a CPUT “manager”?  
And will you have a Manager, Supervisor and sales person/s in the store?

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b.	How will you manage theft/losses?
c.	Do you think students should be paid? Give a reason for your answer. If yes, who should pay them?

**4.a. How do you envisage WIL (work integrated learning) in your store/ space/ department within the Retail Lab?**

b.	How many students do you foresee working here at one time, for how long, and thus how many students can each mini store cover in a year?
c.	Who will complete/sign the logbook?

**5. How can the “store” be managed and run so that all stakeholders (who are they?) are involved?**

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**6. What are your concerns? General, open ended**

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**7. What are the minimum criterions for experience you would expect from a student who has completed the new Chain Store qualification/ the RSM and the new RBM qualifications**

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**ANNEXURE C:**

**Questionnaire for lecturers and others**

**A model for workplace experience and the operations of a retail store on the CPUT  
campus in Cape Town**

**ANNEXURE C:**

**A model for workplace experience and the operations of a retail store on the CPUT  
campus in Cape Town**

***Questionnaire for lecturers and others***

<b>1. The Retail Lab/ Mall</b>	
a.	<b>How do you envisage WIL (work integrated learning) in the store/ space/ department within the Retail Lab?</b>
b.	<b>In your opinion, how many students do you foresee working here at one time, for how long, and thus how many students can the Retail Lab/Mall cover in a year?</b>
c.	<b>Who will complete/sign the logbook?</b>

**2. What are your concerns?**

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**3. Research – list the possible research topics you, as an academic, could explore in this Retail Lab/Mall.**

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Name : \_\_\_\_\_

Signature : \_\_\_\_\_

Date : \_\_\_\_\_

**ANNEXURE D1:**

**Logbook 1<sup>st</sup> year Operations**

**ANNEXURE D1:****Logbook 1<sup>st</sup> year Operations**

Retail Business Management

First Year

**WORK INTEGRATED LEARNING**

Retail Logbook

No: \_\_\_\_\_

**STUDENT INFORMATION**

First names	
Surname	
Student ID number	
ID Number	
Postal Address	
Physical Address	
Contact details Landline	
Cell number	
Email	
Work permit details if applicable	

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5. Declaration of Authenticity	
6. Operational level Tasks and Evidence requirements	



### 1. Focus:

The purpose of this logbook is to ensure that students who complete their Retail Business Management studies have had the opportunity during their training at all three levels to obtain experience of all the different posts, functions and activities of a retail business (CPUT, 2015).

The aim of this logbook is to ensure that the evidence of the work experience students gain at the CPUT retail store is captured and signed off by the relevant parties ie. Store manager/ mentor and student. The focus of the work experience at the CPUT retail store is on providing the student with an opportunity to gain experience in the retail environment at operational level.

### 2. Instructions to student:

- This logbook is to be used to keep track of your practical work experience at the CPUT retail store.
- The logbook should be kept safely and completed neatly. Untidy work will not be accepted. Should this logbook be misplaced, you will be required to start your work placement again.
- This logbook must be accompanied by evidence of the work experience you have gained.
- You are required to complete each task, as given in the logbook and in consultation with your lecturer. The evidence you are required to submit is listed.
- Your Manager at the retail store is required to sign and date each piece of evidence you attach to this logbook.
- You are required to complete approximately 40 hours of work (5 work days) at the retail store
- You will have to ensure you complete ALL the requirements of this logbook so ensure you book your work experience time with the coordinator well in advance. Remember there are many students who will be wanting time in the retail store and you do not want to submit an incomplete logbook simply because you waited too long to schedule your time at the retail store and missed the opportunity to complete a task

The focus of the work experience you will be exposed to at the retail store would include but is not limited to the following categories:

1. Housekeeping
2. Sales and Marketing
3. Stock
4. Finance and Administration
5. Human resource
6. Operations / General

**Code of Conduct:** We would like to refer students to the *Cape Peninsula University of Technology Academic Rules and regulations*.

Further to the CPUT Code of Conduct, we expect students to deliver all services with the utmost integrity, friendliness, empathy, efficiency and professionalism.

#### *Dress code*

1. You are required to dress appropriately at all times.
2. If the organisation requires you to wear specific uniforms, ensure that they are kept clean and immaculate at all times
3. Nails are to be kept short and clean.

Other requirements may have to be adhered to according to the individual organisation's requirements

#### *Identification*

1. You are to carry identification at all times whilst on duty

#### *Telephone calls and Public areas*

1. You may not work with your cellular phones switched on
2. You may not use the store's telephone unless authorised by a senior
3. You shall behave professionally when on duty.

#### *Smoking and consumption of alcohol*

1. You may not smoke in the store.
2. Consumption of alcoholic beverages is not permitted whilst on duty

#### *Transport and time management*

1. You are expected to adhere to your hours of work and be on duty as specified.
2. If you are late for a scheduled learning session, the Manager may deal with the situation according to his/her own discretion and could schedule another learner in your time slot.

#### *Absenteeism*

1. If you are ill you have to notify the coordinator.
2. Should there be an accident, or a serious incident while on duty, the Manager may deal with the situation according to his/her discretion. The Course Coordinator must be notified immediately
3. Being late or failing to report for work will be taken into account when evaluating your work performance in the store.

#### *Removal of products or equipment*

1. Products or equipment may not be removed from the workplace unless authorised by the Manager
2. Any unauthorised removal of product or equipment will be viewed in a serious light and disciplinary action will be taken

#### *Organisation Reports/ Documentation*

1. You are not permitted to falsify or misappropriate any of the reports, documents, records or sick certificates.

#### *Financial Transactions*

1. Comply with the operating procedures if you are instructed to assist with financial transactions involving any form of payment.
2. In the event of any till discrepancies when taken into account when evaluating your performance in the store.

#### *Reporting Emergencies*

1. Should you encounter an emergency situation whilst in the work environment, report this to the Manager on duty and call the campus security immediately.

#### *Discipline Issues*

Discipline is necessary in any environment and organisation. It is better to discipline oneself than being disciplined by someone else.

Breach of discipline would include:

- Leaving the work area without permission.
- Shouting, arguing or fighting with others in the workplace.
- Misbehaving in front of customers.
- Chewing gum whilst on duty.
- Eating, drinking or smoking whilst on duty without permission.
- Selling, possessing or using illegal drugs.
- Carrying a weapon, or threatening to use any object in a dangerous manner.
- Physically and/or willfully threatening or hurting any other person.
- Refusing to follow legitimate instructions.
- Behaving negligently or willfully vandalizing establishment property.
- Sleeping while on duty.
- Acting dishonestly.
- Discussing confidential information.
- Being in possession of unauthorised company property.

### 3. MENTOR/ MANAGER INFORMATION AND GUIDE

Company Name	
Physical Address	
Postal Address	
Contact person Designation	
Contact details Landline Cell number	
Email	
Fax number	

#### Guide for the Mentor/ Manager:

- The Mentor/ Manager at the retail store is required to sign and date all evidence that the student submits. Each task should be signed off.

### 4. REQUIREMENTS AND TIMESHEET

- Students are required to complete a time sheet when they arrive and leave the retail store.
- *Refer to example of Timesheet below*

## Retail Store - CPUT Campus

Time sheet for the month of: August 2016

Student Name:	Thabiso Baloyi
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Student Number:	0174587842
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[illegible]

**5. DECLARATION OF AUTHENTICITY**

I, \_\_\_\_\_, ID number \_\_\_\_\_

hereby declare that the contents of this logbook are entirely my own work with the exception of the items detailed below on this page.

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Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ in

the year \_\_\_\_\_.

\_\_\_\_\_ (Student's signature)

Enquiries concerning the workplace component may be directed to the Programme Coordinator who will assist you with your workplace schedule.

## **RECORD OF WORK INTEGRATED LEARNING**

### **- OPERATIONAL LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-O: OPERATIONS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENT	VERIFICATION		
			Comment	Date	Signature
<b>OP-O-01: Implementation</b>	<b>OP-O-01.1</b> Work to a given plan	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>a report by the manager detailing tasks completed and confirming work implemented within agreed timeframes.</i></li> </ul>			
<b>OP-O-02: Meetings</b>	<b>OP-O-02.1</b> Participate in a planning meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>A report compiled by the student reflecting his/her participation in and contribution to operational meetings, signed by the student's superior.</i></li> </ul>			

**HR-O: HUMAN RESOURCES**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-O-01: Teams work</b>	<b>HR-O-01.1</b> Participate in a team	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence confirming that the student contributed to the efforts of the team.</i></li> </ul>			
<b>HR-O-02: Staff orientation</b>	<b>HR-O-02.1</b> Participate in own orientation	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence indicating the process followed for orientation.</i></li> </ul>			



**HK-O: HOUSEKEEPING**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HK-O-01: Health and safety</b>	<b>HK-O-01.1</b> Implement standards per operational procedure	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards per operational procedure.</i></li> </ul>			
	<b>HK-O-01.2</b> Attend a health and safety meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The minutes of the meeting noting that the student was in attendance.</i></li> </ul>			
<b>HK-O-02: Cleaning</b>	<b>HK-O-02.1</b> Follow a checklist of areas to be cleaned daily, weekly and monthly	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards per operational procedure.</i></li> </ul>			

**SR-O: STAKEHOLDER RELATIONS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-O-01: Internal stakeholder relations</b>	<b>SR-O-01.1</b> Compile a list of stakeholders	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Provide list of internal stakeholders.</i></li> </ul>			
<b>SR-O-02: External stakeholder relations</b>	<b>SR-O-02.1</b> Compile a list of stakeholders	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Provide list of external stakeholders.</i></li> </ul>			

**S-O: STOCK**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S-O-01: Control stock</b>	<b>S-O-01.1</b> Participate in stock receiving and complete documentation	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copies authenticated by the manager of all documents used to receive and check the deliveries.</i></li> </ul>			
	<b>S-O-01.2</b> Participate in unit counts	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>List products counted.</i></li> </ul>			
	<b>S-O-01.3</b> Participate in a stocktake (if applicable)	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student participated in a stocktake.</i></li> </ul>			
<b>S-O-02: Manage stock levels</b>	<b>S-O-02.1</b> Assist in identifying under and over stocks	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Completed list of under and over stocks as confirmed as being correct by the manager.</i></li> </ul>			
<b>S-O-03: Stock range</b>	<b>S-O-03.1</b> Collect data from customers regarding suggested improvements to range	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>List of suggestions collected.</i></li> </ul>			
<b>S-O-04: Merchandising and layout</b>	<b>S-O-04.1</b> Pack and display merchandise as per operating standards and instructions	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence (photos).</i></li> </ul>			

<b>S-O-05: Buying / ordering of stock</b>	<b>S-O-05.1</b> Identify products that require replenishment	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence listing identified shortage of stock.</i></li> </ul>			
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**S&M-O: SALES AND MARKETING**

	<b>ACTIVITIES OPERATIONS</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>S&amp;M-O-01: Sales activities</b>	<b>S&amp;M-O-01.1</b> Analyse and understand the daily, weekly and monthly targets for the salesperson and the department	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Monthly sales budget along with calculations and breakdown for weeks of the month and targets set per department or category.</i></li> </ul>			
<b>S&amp;M-O-02: Promotions</b>	<b>S&amp;M-O-02.1</b> Participate in promotional displays and activities	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Photographic evidence of the student participating in promotional displays and activities.</i></li> </ul>			
<b>S&amp;M-O-03: Customer service</b>	<b>S&amp;M-O-03.1</b> Implement customer service standards	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards as required.</i></li> </ul>			
	<b>S&amp;M-O-03.2</b> Record customer queries	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Record of customer queries and complaints.</i></li> </ul>			

**R&A-O: RISKS AND ASSETS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-O-01: Risk management</b>	<b>R&amp;A-O-01.1</b> Identify products susceptible to theft in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence showing the products that have been identified and confirmed by the manager as being correct.</li> </ul>			
	<b>R&amp;A-O-01.2</b> Minimise shrinkage and losses in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Report by the manager stating that the student works in a manner that minimises shrinkage and losses in a store.</li> </ul>			
<b>R&amp;A-O-02: Assets</b>	<b>R&amp;A-O-02.1</b> Work with fixed and current assets in a manner that minimises damage	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence indicating that the student worked with both current and fixed assets in a manner that minimises the shrinkage and losses.</li> </ul>			

**F&A-O: FINANCE AND ADMIN**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>F&amp;A-O-01: Cash</b>	<b>F&amp;A-O-01.1</b> Operate the till	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence in the form of a report from manager noting the days and times the student operated the till</li> <li>Documented proof of students' overs and shorts on the till.</li> </ul>			

	<b>F&amp;A-O-01.2</b> Control own till change	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report noting that the student controlled her/ his own till change and processed their cash up at the till</i></li> </ul>			
	<b>F&amp;A-O-01.3</b> Control payments for sales on a till.	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report noting that the student accepted payment and controlled tender.</i></li> </ul>			
<b>F&amp;A-O-02: Filing</b>	<b>F&amp;A-O-02.1</b> Process filing as per the SOPs	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence that the student participated in filing at the store</i></li> </ul>			
<b>F&amp;A-O-03: Product knowledge</b>	<b>F&amp;A-O-03.1</b> Participate in product knowledge training	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report by the manager stating that the student has been questioned on products and was able to demonstrate sufficient knowledge of the product.</i></li> </ul>			

**ANNEXURE D2:**  
**Logbook 2nd year Supervisory**

**ANNEXURE D2:****Logbook 2nd year Supervisory**

Retail Business Management

Second Year

**WORK INTEGRATED LEARNING**

Retail Logbook

No: \_\_\_\_\_

**STUDENT INFORMATION**

First names	
Surname	
Student ID number	
ID Number	
Postal Address	
Physical Address	
Contact details Landline  Cell number	
Email	
Work permit details if applicable	

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### 1. Focus:

The purpose of this logbook is to ensure that students who complete their Retail Business Management studies have had the opportunity during their training at all three levels to obtain experience of all the different posts, functions and activities of a retail business (CPUT, 2015).

The aim of this logbook is to ensure that the evidence of the work experience students gain at the CPUT retail store is captured and signed off by the relevant parties ie. Store manager/ mentor and student. The focus of the work experience at the CPUT retail store is on providing the student with an opportunity to gain experience in the retail environment at supervisory level.

### 2. Instructions to student:

- This logbook is to be used to keep track of your practical work experience at the CPUT retail store.
- The logbook should be kept safely and completed neatly. Untidy work will not be accepted. Should this logbook be misplaced, you will be required to start your work placement again.
- This logbook must be accompanied by evidence of the work experience you have gained.
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- You are required to complete approximately 40 hours of work (5 work days) at the retail store
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The focus of the work experience you will be exposed to at the retail store would include but is not limited to the following categories:

1. Housekeeping
2. Sales and Marketing
3. Stock
4. Finance and Administration
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6. Operations / General

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Further to the CPUT Code of Conduct, we expect students to deliver all services with the utmost integrity, friendliness, empathy, efficiency and professionalism.

#### *Dress code*

1. You are required to dress appropriately at all times.
2. If the organisation requires you to wear specific uniforms, ensure that they are kept clean and immaculate at all times

3. Nails are to be kept short and clean.

Other requirements may have to be adhered to according to the individual organisation's requirements

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1. You are to carry identification at all times whilst on duty

#### *Telephone calls and Public areas*

1. You may not work with your cellular phones switched on
2. You may not use the store's telephone unless authorised by a senior
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1. Comply with the operating procedures if you are instructed to assist with financial transactions involving any form of payment.
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Discipline is necessary in any environment and organisation. It is better to discipline oneself than being disciplined by someone else.

Breach of discipline would include:

- Leaving the work area without permission.
- Shouting, arguing or fighting with others in the workplace.
- Misbehaving in front of customers.
- Chewing gum whilst on duty.
- Eating, drinking or smoking whilst on duty without permission.
- Selling, possessing or using illegal drugs.
- Carrying a weapon, or threatening to use any object in a dangerous manner.
- Physically and/or willfully threatening or hurting any other person.
- Refusing to follow legitimate instructions.
- Behaving negligently or willfully vandalizing establishment property.
- Sleeping while on duty.
- Acting dishonestly.
- Discussing confidential information.
- Being in possession of unauthorised company property.

### 3. MENTOR/ MANAGER INFORMATION AND GUIDE

Company Name	
Physical Address	
Postal Address	
Contact person Designation	
Contact details Landline Cell number	
Email	
Fax number	

#### Guide for the Mentor/ Manager:

- The Mentor/ Manager at the retail store is required to sign and date all evidence that the student submits. Each task should be signed off.

### 4. REQUIREMENTS AND TIMESHEET

- Students are required to complete a time sheet when they arrive and leave the retail store.
- *Refer to example of Timesheet below*

## Retail Store - CPUT Campus

Time sheet for the month  
of: August 2016

Student Name:	Thabiso Baloyi
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Student Number:	0174587842
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[illegible]

**5. DECLARATION OF AUTHENTICITY**

I, \_\_\_\_\_, ID number \_\_\_\_\_

hereby declare that the contents of this logbook are entirely my own work with the exception of the items detailed below on this page.

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Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ in

the year \_\_\_\_\_.

\_\_\_\_\_ (Student's signature)

Enquiries concerning the workplace component may be directed to the Programme Coordinator who will assist you with your workplace schedule.

## **RECORD OF WORK INTEGRATED LEARNING**

### **- SUPERVISORY LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-S: OPERATIONS**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>OP-S-01: Operations supervision</b>	<b>OP-S-01.1</b> Supervise to ensure operational targets are being met	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence from the students' superior detailing the student's success in supervising the implementing of operational plans and achieving operational goals.</li> </ul>			
<b>OP-S-02: Meetings</b>	<b>OP-S-02.1</b> Compile action lists based on operational meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Action lists arising from operational meetings taking into account all operational requirements and staffing.</li> </ul>			

**HR-S: HUMAN RESOURCES**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-S-01: Teams work</b>	<b>HR-S-01.1</b> Motivate and supervise team activities to achieve objectives	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documented evidence detailing how the student went about motivating the members of the team to achieve operational objectives.</li> <li>Documented evidence detailing how the student organised the members of the team and controlled their work to ensure the achievement of operational objectives and standards within required timeframes.</li> </ul>			



<b>HR-S-02: Supervising staff</b>	<b>HR-S-02.1</b> Resolve performance problem issues	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Notes compiled by the student explaining what performance issues were resolved.</li> </ul>			
	<b>HR-S-02.2</b> Participate in disciplinary processes	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Disciplinary records and minutes reflecting the student's participation in and contribution to all disciplinary processes in accordance with company procedure.</li> </ul>			
<b>HR-S-03: Staff induction</b>	<b>HR-S-03.1</b> Prepare for an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Checklist detailing all points to be covered in the induction and listing any documentation to be completed.</li> </ul>			
	<b>HR-S-03.2</b> Conduct an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Produce plans that details all topics covered in an induction.</li> </ul>			

**HK-S: HOUSEKEEPING**

	<b>ACTIVITIES SUPERVISORY</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>HK-S-01: Health and safety</b>	<b>HK-S-01.1</b> Evaluate and identify areas not up to standard	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Evaluation reports completed by the student along with an action plan by the student to address improvements needed.</li> </ul>			
<b>HK-S-02: Cleaning</b>	<b>HK-S-02.1</b> Compile a cleaning checklist	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Checklists completed by the student.</li> </ul>			

	<b>HK-S-02.2</b> Check staffs' cleaning per checklist and recommend improvements	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Checklists completed by the student along with recommendations made by the student that are appropriate to addressing the improvements needed.</i></li> </ul>			
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**SR-S: STAKEHOLDER RELATIONS**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-S-01: Internal stakeholder relations</b>	<b>SR-S-01.1</b> Evaluate the performance of 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The reports accurately detail the performance of the internal stakeholders.</i></li> </ul>			
<b>SR-S-02: External stakeholder relations</b>	<b>SR-S-02.1</b> Evaluate the performance of 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The reports accurately detail the performance of the external stakeholders.</i></li> </ul>			

**S-S: STOCK**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S-S-01: Control stock</b>	<b>S-S-01.1</b> Supervise stock receiving and check documentation	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The checklist details all in-store operational processes including the receiving and dispatch of stock, stock counts and recording of sales and returned merchandise.</i></li> </ul>			

	<b>S-S-01.2</b> Plan and implement a unit count	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student planned and implemented stock counts.</i></li> </ul>			
	<b>S-S-01.3</b> Participate in stock-takes if applicable. Supervise staff during a stocktake	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has participated in stocktakes.</i></li> </ul>			
<b>S-S-02: Supervise stock levels</b>	<b>S-S-02.1</b> Evaluate overs and shorts reports presented by staff	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report from supervisor along with overs and shorts reports presented by staff showing his/ her ability to evaluate the staffs' reports.</i></li> </ul>			
	<b>S-S-02.2</b> Recommend actions to eliminate over stocks	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report detailing action to be taken to eliminate over stocks with the manager's comments on the practicality of the student's proposal.</i></li> </ul>			
	<b>S-S-02.3</b> Recommend orders	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report by the manager detailing the accuracy of the recommended orders.</i></li> </ul>			
<b>S-S-03: Stock range</b>	<b>S-S-03.1</b> Propose new products	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report proposing new products based on information, collected by the staff, from customer queries.</i></li> </ul>			
<b>S-S-04: Merchandising and layout</b>	<b>S-S-04.1</b> Evaluate merchandise displays	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Evaluation of displays based on sales and recommend changes based on these sales in order to improve turnover in the store.</i></li> </ul>			

**BL-S: BOTTOM LINE**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>BL-S-01: Performance reports</b>	<b>BL-S-01.1</b> Analyse 4 months' sales actual to budget and the previous year	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Store performance reports along with the student's analyses and identification of entries that need to be improved.</i></li> </ul>			
	<b>BL-S-01.2</b> Identify areas that require action	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Draw up an action plan to improve entries identified on the store performance reports.</i></li> <li>• <i>Evaluate success of the action plans implemented based on the following few month's reports</i></li> </ul>			

**S&M-S: SALES AND MARKETING**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S&amp;M-S-01: Sales activities</b>	<b>S&amp;M-S-01.1</b> Allocate targets per sales person	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Agenda and attendance register showing details of meetings of those sales staff that attended.</i></li> <li>• <i>Documentation showing how total sales have been broken up per sales assistant.</i></li> </ul>			
	<b>S&amp;M-S-01.2</b> Compare individual and department actual results against target	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence detailing the students' ability to motivate sales team to achieve sales</i></li> </ul>			

	and motivate staff	<i>targets.</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence showing targets and achievements by sales team and learner's evaluation of their achievements.</i></li> </ul>			
<b>S&amp;M-S-02: Promotions</b>	<b>S&amp;M-S-02.1</b> Allocate promotional activities and supervise implementation	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Copy of promotional implementation plan.</i></li> <li>• <i>Report from the manager confirming all promotional activities were completed to the right standards within the required time frames.</i></li> </ul>			
	<b>S&amp;M-S-02.2</b> Supervise the displays and stock during a promotion	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report by the manager confirming the manner in which the displays were managed throughout their lifespan and that they met organisational standards.</i></li> </ul>			
<b>S&amp;M-S-03: Customer service</b>	<b>S&amp;M-S-03.1</b> Evaluate customer service	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report detailing the standards of service observed.</i></li> </ul>			
	<b>S&amp;M-S-03.2</b> Develop action plans to improve shortfalls identified	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Action plans developed to improve the shopping experience for the customer.</i></li> </ul>			
	<b>S&amp;M-S-03.3</b> Resolve customer complaints	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Records of complaints and their resolutions as handled by the student.</i></li> </ul>			

**R&A-S: RISKS AND ASSETS**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-S-01: Risk management</b>	<b>R&amp;A-S-01.1</b> Develop checklist to evaluate the areas of risk in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The checklist signed off as being a complete list of areas of risk by the manager.</i></li> </ul>			
	<b>R&amp;A-S-01.2</b> Evaluate risks to the store and propose action to min. losses.	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence showing the evaluation carried out by the student and action plan proposed – signed off by the manager.</i></li> </ul>			
	<b>R&amp;A-S-01.3</b> Communicate and allocate actions from the action plan	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The agenda of the meeting held to implement the action plan to be signed off by staff who attended.</i></li> </ul>			
	<b>R&amp;A-S-01.4</b> Minimise risks to the store.	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Report by the manager confirming the action plan was implemented and has the ability to minimise losses to the store.</i></li> </ul>			
<b>R&amp;A-S-02: Asset management</b>	<b>R&amp;A-S-02.1</b> Identify the assets under maintenance contract	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>An accurate list of applicable assets.</i></li> </ul>			
	<b>R&amp;A-S-02.2</b> Draw up a fixed assets register	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Fixed assets register confirmed by the manager as being complete.</i></li> </ul>			
	<b>R&amp;A-S-02.3</b> Implement and supervise a fixed	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence by the manager confirming the count</i></li> </ul>			

	asset count	<i>was implemented according to organisational standards.</i>			
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**F&A-S: FINANCE AND ADMIN**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>F&amp;A-S-01: Cash management</b>	<b>F&amp;A-S-01.1</b> Cash up tills and follow up on till shortages and overs	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of a report from manager noting that tills were accurately cashed up and till discrepancies correctly handled.</i></li> </ul>			
	<b>F&amp;A-S-01.2</b> Manage change	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of a report from manager noting that the ordering of change for tills according to expected turnover was accurate.</i></li> </ul>			
	<b>F&amp;A-S-01.3</b> Prepare cash for deposit and complete administration for cash deposits	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence signed by the manager indicating that the student prepared the cash for administration and deposits.</i></li> </ul>			
<b>F&amp;A-S-02: Filing</b>	<b>F&amp;A-S-02.1</b> Supervise filing	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence, signed by the manager that the student supervised filing in the store.</i></li> </ul>			
<b>F&amp;A-S-03: Product knowledge</b>	<b>F&amp;A-S-03.1</b> Implement product knowledge training	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of a report noting the</i></li> </ul>			

		<i>student implementing product knowledge training.</i>			
	<b>F&amp;A-S-03.2</b> Develop and test staffs' product knowledge	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Draw up a questionnaire to assess staff's product knowledge on 2 specific products. Provide feedback on the product to staff</i></li> </ul>			



**ANNEXURE D3:**  
**Logbook 3rd year Managerial**

**ANNEXURE D3:**

**Logbook 3rd year Managerial**

Retail Business Management

Third Year

**WORK INTEGRATED LEARNING**

Retail Logbook

No: \_\_\_\_\_

**STUDENT INFORMATION**

First names	
Surname	
Student ID number	
ID Number	
Postal Address	
Physical Address	
Contact details Landline	
Cell number	
Email	
Work permit details if applicable	

## Table of Contents

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1. Focus	
2. Instructions to student & Code of Conduct	
3. Mentor/ Manager Information and Guide	
4. Requirements and Timesheet	
5. Declaration of Authenticity	
6. Management level Tasks and Evidence requirements	

### 1. Focus:

The purpose of this logbook is to ensure that students who complete their Retail Business Management studies have had the opportunity during their training at all three levels to obtain experience of all the different posts, functions and activities of a retail business (CPUT, 2015).

The aim of this logbook is to ensure that the evidence of the work experience students gain at the CPUT retail store is captured and signed off by the relevant parties ie. Store manager/ mentor and student. The focus of the work experience at the CPUT retail store is on providing the student with an opportunity to gain experience in the retail environment at managerial level.

### 2. Instructions to student:

- This logbook is to be used to keep track of your practical work experience at the CPUT retail store.
- The logbook should be kept safely and completed neatly. Untidy work will not be accepted. Should this logbook be misplaced, you will be required to start your work placement again.
- This logbook must be accompanied by evidence of the work experience you have gained.
- You are required to complete each task, as given in the logbook and in consultation with your lecturer. The evidence you are required to submit is listed.
- Your Manager at the retail store is required to sign and date each piece of evidence you attach to this logbook.
- You are required to complete approximately 40 hours of work (5 work days) at the retail store
- You will have to ensure you complete ALL the requirements of this logbook so ensure you book your work experience time with the coordinator well in advance. Remember there are many students who will be wanting time in the retail store and you do not want to submit an incomplete logbook simply because you waited too long to schedule your time at the retail store and missed the opportunity to complete a task

The focus of the work experience you will be exposed to at the retail store would include but is not limited to the following categories:

1. Housekeeping
2. Sales and Marketing
3. Stock
4. Finance and Administration
5. Human resource
6. Operations / General

**Code of Conduct:** We would like to refer students to the *Cape Peninsula University of Technology Academic Rules and regulations*.

Further to the CPUT Code of Conduct, we expect students to deliver all services with the utmost integrity, friendliness, empathy, efficiency and professionalism.

#### *Dress code*

1. You are required to dress appropriately at all times.
2. If the organisation requires you to wear specific uniforms, ensure that they are kept clean and immaculate at all times
3. Nails are to be kept short and clean.

Other requirements may have to be adhered to according to the individual organisation's requirements

#### *Identification*

1. You are to carry identification at all times whilst on duty

#### *Telephone calls and Public areas*

1. You may not work with your cellular phones switched on
2. You may not use the store's telephone unless authorised by a senior
3. You shall behave professionally when on duty.

#### *Smoking and consumption of alcohol*

1. You may not smoke in the store.
2. Consumption of alcoholic beverages is not permitted whilst on duty

#### *Transport and time management*

1. You are expected to adhere to your hours of work and be on duty as specified.
2. If you are late for a scheduled learning session, the Manager may deal with the situation according to his/her own discretion and could schedule another learner in your time slot.

#### *Absenteeism*

1. If you are ill you have to notify the coordinator.
2. Should there be an accident, or a serious incident while on duty, the Manager may deal with the situation according to his/her discretion. The Course Coordinator must be notified immediately
3. Being late or failing to report for work will be taken into account when evaluating your work performance in the store.

#### *Removal of products or equipment*

1. Products or equipment may not be removed from the workplace unless authorised by the Manager
2. Any unauthorised removal of product or equipment will be viewed in a serious light and disciplinary action will be taken

#### *Organisation Reports/ Documentation*

1. You are not permitted to falsify or misappropriate any of the reports, documents, records or sick certificates.

#### *Financial Transactions*

1. Comply with the operating procedures if you are instructed to assist with financial transactions involving any form of payment.
2. In the event of any till discrepancies when taken into account when evaluating your performance in the store.

#### *Reporting Emergencies*

1. Should you encounter an emergency situation whilst in the work environment, report this to the Manager on duty and call the campus security immediately.

#### *Discipline Issues*

Discipline is necessary in any environment and organisation. It is better to discipline oneself than being disciplined by someone else.

Breach of discipline would include:

- Leaving the work area without permission.
- Shouting, arguing or fighting with others in the workplace.
- Misbehaving in front of customers.
- Chewing gum whilst on duty.
- Eating, drinking or smoking whilst on duty without permission.
- Selling, possessing or using illegal drugs.
- Carrying a weapon, or threatening to use any object in a dangerous manner.
- Physically and/or willfully threatening or hurting any other person.
- Refusing to follow legitimate instructions.
- Behaving negligently or willfully vandalizing establishment property.
- Sleeping while on duty.
- Acting dishonestly.
- Discussing confidential information.
- Being in possession of unauthorised company property.

### 3. MENTOR/ MANAGER INFORMATION AND GUIDE

Company Name	
Physical Address	
Postal Address	
Contact person Designation	
Contact details Landline Cell number	
Email	
Fax number	

#### Guide for the Mentor/ Manager:

- The Mentor/ Manager at the retail store is required to sign and date all evidence that the student submits. Each task should be signed off.

### 4. REQUIREMENTS AND TIMESHEET

- Students are required to complete a time sheet when they arrive and leave the retail store.
- *Refer to example of Timesheet below*

## Retail Store - CPUT Campus

Time sheet for the month  
of: August 2016

Student Name:	Thabiso Baloyi
---------------	----------------

Student  
Number: 0174587842

[illegible]



## 5. DECLARATION OF AUTHENTICITY

I, \_\_\_\_\_, ID number \_\_\_\_\_

hereby declare that the contents of this logbook are entirely my own work with the exception of the items detailed below on this page.

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Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ in

the year \_\_\_\_\_.

\_\_\_\_\_ (Student's signature)

Enquiries concerning the workplace component may be directed to the Programme Coordinator who will assist you with your workplace schedule.

## **RECORD OF WORK INTEGRATED LEARNING**

### **– MANAGERIAL LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-M: OPERATIONS**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>OP-M-01: Operations Planning</b>	<b>OP-M-01.1</b> Compile a weekly schedule for staff in the shop	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copies of the weekly operational plans showing staff schedule.</i></li> </ul>			
	<b>OP-M-01.2</b> Implement and adjust a weekly schedule for staff in the shop	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence from the manager detailing the student's success in implementing operational plans and achieving operational goals.</i></li> </ul>			
<b>OP-M-02: Meetings</b>	<b>OP-M-02.1</b> Chair an operational meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of an agenda and minutes of a meeting indicating that the student was the chair.</i></li> </ul>			

**HR-M: HUMAN RESOURCES**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-M-01: Teams work</b>	<b>HR-M-01.1</b> Manage team activities to achieve objectives	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documented evidence detailing how the student went about motivating the members of the team to achieve operational objectives.</i></li> <li><i>Documented evidence detailing how the student organised the members of the team and</i></li> </ul>			

		<i>controlled their work to ensure the achievement of operational objectives and standards within required timeframes.</i>			
<b>HR-M-02: Supervising staff</b>	<b>HR-M-02.1</b> Lead disciplinary processes	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Notes compiled by the student explaining what performance issues were resolved and how this was done.</i></li> <li>• <i>Disciplinary records and minutes reflecting the student's participation in and contribution to all disciplinary processes in accordance with procedures.</i></li> </ul>			
<b>HR-M-03: Staff induction</b>	<b>HR-M-03.1</b> Manage an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on the induction checklist prepared by the supervisor on how well the supervisor implemented an induction.</i></li> </ul>			

**HK-M: HOUSEKEEPING**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>HK-M-01: Health and safety</b>	<b>HK-M-01.1</b> Chair a health and safety meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence of the student having chaired a health, safety meeting.</i></li> </ul>			
	<b>HK-M-01.2</b> Manage health and safety activities	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence of the student having managed health,</i></li> </ul>			

		<i>safety and housekeeping to required standards.</i>			
<b>HK-M-02:</b> Cleaning	<b>HK-M-02.1</b> Manage cleaning activities	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li><i>the evaluation of the checklist designed by the supervisor</i></li> <li><i>evaluation of the supervisor's report on the stores housekeeping standards</i></li> <li><i>the success of the supervisor in improving housekeeping standards.</i></li> </ul>			

#### SR-M: STAKEHOLDER RELATIONS

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-M-01:</b> <b>Internal stakeholder relations</b>	<b>SR-M-01.1</b> Evaluate performance of 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The report accurately details the performance of the internal stakeholders.</i></li> </ul>			
	<b>SR-M-01.2</b> Maintain relations with 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence detailing the steps taken by the student to build or maintain effective relations with the internal stakeholder.</i></li> </ul>			
<b>SR-M-02:</b> <b>External stakeholder relations</b>	<b>SR-M-02.1</b> Evaluate performance of 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The report accurately details the performance of the external stakeholders and is signed off by the manager.</i></li> </ul>			

	<b>SR-M-02.2</b> Maintain relations with 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence detailing the steps taken by the student to build or maintain effective relations with an external stakeholder</i></li> </ul>			
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**S-M: STOCK**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>S-M-01: Control stock</b>	<b>S-M-01.1</b> Manage and evaluate stock receiving procedures. Provide a report with recommendations	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has checked all these in store processes monthly and taken action to correct processes where they have not been followed correctly.</i></li> </ul>			
	<b>S-M-01.2</b> Evaluate unit counts and prepare a report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has checked all these in store processes and taken action to correct processes where they have not been followed correctly.</i></li> </ul>			
	<b>S-M-01.3</b> Plan and implement stocktakes (if applicable)	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary feedback from the manager that the student had participated and planned a stocktake.</i></li> </ul>			
<b>S-M-02: Manage stock</b>	<b>S-M-02.1</b> Manage stock	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Copies of orders placed by the</i></li> </ul>			

<b>levels</b>	ordering	<i>student and documentary evidence showing how these order were calculated.</i>			
	<b>S-M-02.2</b> Evaluate the supervisors stock control procedures	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li><i>the evaluation of the orders recommended by the supervisor to reduce stock shortages</i></li> <li><i>the evaluation of the suggestions put forward by the supervisor to clear over stocks.</i></li> </ul>			
<b>S-M-03: Stock range</b>	<b>S-M-03.1</b> Create action plan and motivate to improve the range of stock	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copy of the motivation written by the student showing the correct use of terminology and giving sound evidence that the proposals could improve the store's sales and margins.</i></li> </ul>			
<b>S-M-04: Merchandising and layout</b>	<b>S-M-04.1</b> Recommend improvements to the merchandising layout and display of the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copy of the motivation written by the student showing the correct use of terminology and giving sound evidence that the proposals could improve the store's sales and margins.</i></li> </ul>			

**BL-M: BOTTOM LINE**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>BL-M-01: Performance</b>	<b>BL-M-01.1</b> Evaluate the impact of	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Store performance reports along</i></li> </ul>			

<b>reports</b>	the action plans implemented by the supervisor to improve the bottom line of the store	<i>with the supervisors' analyses evaluating the entries that need to be improved.</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence evaluating the success of the action plans implemented by the supervisor.</i></li> </ul>			
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### S&M-M: SALES AND MARKETING

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S&amp;M-M-01: Sales activities</b>	<b>S&amp;M-M-01.1</b> Evaluate supervisors break down of sales targets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence commenting on the accuracy of the supervisors breaking down of targets.</i></li> </ul>			
	<b>S&amp;M-M-01.2</b> Evaluate supervisor's performance in improving sales activities of staff	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>The evaluation of the supervisor's performance</i></li> <li>• <i>Minutes of the meeting communicating effectiveness of the supervisor's activities</i></li> <li>• <i>Details of any corrective action required from the supervisor.</i></li> </ul>			
<b>S&amp;M-M-02: Promotions</b>	<b>S&amp;M-M-02.1</b> Manage implementation of promotional activities	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>Items on promotion and how they need to be displayed</i></li> <li>• <i>Minutes of meeting with supervisor to communication promotional requirements.</i></li> </ul>			



	<b>S&amp;M-M-02.2</b> Evaluate and report on promotional activities, displays and ticketing	<i>Evidence: Report by the student detailing:</i> <ul style="list-style-type: none"> <li>• <i>the process followed to manage the implementation of promotional activity</i></li> <li>• <i>feedback given to the supervisor on his or her supervision of promotional activities.</i></li> </ul>			
	<b>S&amp;M-M-02.3</b> Evaluate and report on the success of the promotion in terms of customer interest and sales results	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating the success of the promotions.</i></li> </ul>			
<b>S&amp;M-M-03: Customer service</b>	<b>S&amp;M-M-03.1</b> Develop a checklist to evaluate impact points with the customer	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Checklist created to evaluate all areas of customer service within the store, signed off by the students' superior confirming that all areas are included.</i></li> </ul>			
	<b>S&amp;M-M-03.2</b> Evaluate the supervisor's ability to improve customer service.	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>evaluation of the supervisor's report on the stores customer service standards</i></li> <li>• <i>the success of the supervisor in improving customer service standards.</i></li> </ul>			

**R&A-M: RISKS AND ASSETS**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-M-01: Risk management</b>	<b>R&amp;A-M-01.1</b> Evaluate accuracy of Supervisors analyses of risk potential and prevention in the store and report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' analysis and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.2</b> Evaluate accuracy of Supervisors analyses of shrinkage potential and prevention in the store and report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' analysis and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.3</b> Evaluate actions proposed by supervisor and authorise action to minimise theft of products susceptible to theft in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' proposals and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.4</b> Evaluate the implementation of the supervisors' action plan to minimise shrinkage and losses in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisor's implementation and any corrective action required.</i></li> </ul>			

<b>R&amp;A-M-02: Asset management</b>	<b>R&amp;A-M-02.1</b> Evaluate the use of fixed assets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on how well fixed assets are used and maintained in the store.</i></li> <li>• <i>List corrective action taken.</i></li> </ul>			
	<b>R&amp;A-M-02.2</b> Evaluate the handling of current assets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on how well current assets are handled and the damages suffered by the store.</i></li> <li>• <i>List corrective action taken.</i></li> </ul>			
	<b>R&amp;A-M-02.3</b> Evaluate the fixed assets register drawn up by the supervisor.	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence showing the evaluation of the fixed assets register drawn up by the supervisor indicating any corrections required.</i></li> </ul>			

**F&A-M: FINANCE AND ADMIN**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>F&amp;A-M-01: Cash management</b>	<b>F&amp;A-M-01.1</b> Evaluate management of cash in the store	<i>Evidence: documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>cash up documentation is checked for accuracy</i></li> <li>• <i>a report evaluating the safe handling and keeping of takings and change in the store</i></li> <li>• <i>an action plan detailing improvements proposed to ensure better handling and safe keeping of cash in the store</i></li> </ul>			

		<ul style="list-style-type: none"> <li>• <i>A report detailing how the student managed till overs and shorts.</i></li> </ul>			
<b>F&amp;A-M-02: Shopping centre management</b>	<b>F&amp;A-M-02.1</b> Chair tenant's meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Minutes of meeting which indicate that the student was the chair.</i></li> </ul>			
<b>F&amp;A-M-03: Product knowledge</b>	<b>F&amp;A-M-03.1</b> Evaluate staff product knowledge.	<i>Evidence: Documentary evidence as follows:</i> <ul style="list-style-type: none"> <li>• <i>A questionnaire used to evaluate staffs' product knowledge</i></li> <li>• <i>A report on the level of staffs' product knowledge</i></li> <li>• <i>Feedback to the supervisor detailing any actions needed to improve staff product knowledge.</i></li> </ul>			

**ANNEXURE D4:****Logbook*****Combined levels 1, 2 and 3***

**ANNEXURE D4:****Logbook*****Combined levels 1, 2 and 3***

Retail Business Management

First/ Second/ Third Years - combined

**WORK INTEGRATED LEARNING****Retail Logbook****STUDENT INFORMATION**

First names	
Surname	
Student ID number	
ID Number	
Postal Address	
Physical Address	
Contact details Landline	
Cell number	
Email	
Work permit details if applicable	

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### 1. Focus:

The purpose of this logbook is to ensure that students who complete their Retail Business Management studies have had the opportunity during their training at all three levels to obtain experience of all the different posts, functions and activities of a retail business (CPUT, 2015).

The aim of this logbook is to ensure that the evidence of the work experience students gain at the CPUT retail store is captured and signed off by the relevant parties ie. Store manager/ mentor and student. The focus of the work experience at the CPUT retail store is on providing the student with an opportunity to gain experience in the retail environment at operational level.

### 2. Instructions to student:

- This logbook is to be used to keep track of your practical work experience at the CPUT retail store.
- The logbook should be kept safely and completed neatly. Untidy work will not be accepted. Should this logbook be misplaced, you will be required to start your work placement again.
- This logbook must be accompanied by evidence of the work experience you have gained.
- You are required to complete each task, as given in the logbook and in consultation with your lecturer. The evidence you are required to submit is listed.
- Your Manager at the retail store is required to sign and date each piece of evidence you attach to this logbook.
- You are required to complete approximately 40 hours of work (5 work days) at the retail store
- You will have to ensure you complete ALL the requirements of this logbook so ensure you book your work experience time with the coordinator well in advance. Remember there are many students who will be wanting time in the retail store and you do not want to submit an incomplete logbook simply because you waited too long to schedule your time at the retail store and missed the opportunity to complete a task

The focus of the work experience you will be exposed to at the retail store would include but is not limited to the following categories:

1. Housekeeping
2. Sales and Marketing
3. Stock
4. Finance and Administration
5. Human resource
6. Operations / General

**Code of Conduct:** We would like to refer students to the *Cape Peninsula University of Technology Academic Rules and regulations*.

Further to the CPUT Code of Conduct, we expect students to deliver all services with the utmost integrity, friendliness, empathy, efficiency and professionalism.

#### *Dress code*

1. You are required to dress appropriately at all times.
2. If the organisation requires you to wear specific uniforms, ensure that they are kept clean and immaculate at all times
3. Nails are to be kept short and clean.



Other requirements may have to be adhered to according to the individual organisation's requirements

#### *Identification*

1. You are to carry identification at all times whilst on duty

#### *Telephone calls and Public areas*

1. You may not work with your cellular phones switched on
2. You may not use the store's telephone unless authorised by a senior
3. You shall behave professionally when on duty.

#### *Smoking and consumption of alcohol*

1. You may not smoke in the store.
2. Consumption of alcoholic beverages is not permitted whilst on duty

#### *Transport and time management*

1. You are expected to adhere to your hours of work and be on duty as specified.
2. If you are late for a scheduled learning session, the Manager may deal with the situation according to his/her own discretion and could schedule another learner in your time slot.

#### *Absenteeism*

1. If you are ill you have to notify the coordinator.
2. Should there be an accident, or a serious incident while on duty, the Manager may deal with the situation according to his/her discretion. The Course Coordinator must be notified immediately
3. Being late or failing to report for work will be taken into account when evaluating your work performance in the store.

#### *Removal of products or equipment*

1. Products or equipment may not be removed from the workplace unless authorised by the Manager
2. Any unauthorised removal of product or equipment will be viewed in a serious light and disciplinary action will be taken

#### *Organisation Reports/ Documentation*

1. You are not permitted to falsify or misappropriate any of the reports, documents, records or sick certificates.

#### *Financial Transactions*

1. Comply with the operating procedures if you are instructed to assist with financial transactions involving any form of payment.
2. In the event of any till discrepancies when taken into account when evaluating your performance in the store.

#### *Reporting Emergencies*

1. Should you encounter an emergency situation whilst in the work environment, report this to the Manager on duty and call the campus security immediately.

#### *Discipline Issues*

Discipline is necessary in any environment and organisation. It is better to discipline oneself than being disciplined by someone else.

Breach of discipline would include:

- Leaving the work area without permission.
- Shouting, arguing or fighting with others in the workplace.
- Misbehaving in front of customers.
- Chewing gum whilst on duty.
- Eating, drinking or smoking whilst on duty without permission.
- Selling, possessing or using illegal drugs.
- Carrying a weapon, or threatening to use any object in a dangerous manner.
- Physically and/or willfully threatening or hurting any other person.
- Refusing to follow legitimate instructions.
- Behaving negligently or willfully vandalizing establishment property.
- Sleeping while on duty.
- Acting dishonestly.
- Discussing confidential information.
- Being in possession of unauthorised company property.

### 3. MENTOR/ MANAGER INFORMATION AND GUIDE

Company Name	
Physical Address	
Postal Address	
Contact person Designation	
Contact details Landline Cell number	
Email	
Fax number	

#### Guide for the Mentor/ Manager:

- The Mentor/ Manager at the retail store is required to sign and date all evidence that the student submits. Each task should be signed off.

### 4. REQUIREMENTS AND TIMESHEET

- Students are required to complete a time sheet when they arrive and leave the retail store.
- *Refer to example of Timesheet below*

**Retail Store - CPUT Campus**

Time sheet for the month of: August 2016

Student Name: Thabiso Baloyi

Student Number: 0174587842

Date	Day	Start time	End time	Hours worked	Logbook number	Manager Name	Manager signature	Student signature
04/08/2016	Tues	09:00	11:00	02:00	O-2016 (V 1) S-2016 (V 1) M-2016 (V 1)	Fred Booysen	f Booysen	<i>T Baloyi</i>
07/08/2016	Fri	14:00	15:00	01:00	O-2016 (V 1) S-2016 (V 1) M-2016 (V 1)	Fred Booysen	f Booysen	<i>T Baloyi</i>
10/05/2016	Mon	11:00	12:00	01:00	O-2016 (V 1) S-2016 (V 1) M-2016 (V 1)	Mildred Taylor	<i>M Taylor</i>	<i>T Baloyi</i>
18/08/2016	Tues	09:00	11:00	02:00	O-2016 (V 1) S-2016 (V 1) M-2016 (V 1)	Mildred Taylor	<i>M Taylor</i>	<i>T Baloyi</i>
19/08/2016	Wed	09:00	10:00	01:00	O-2016 (V 1) S-2016 (V 1) M-2016 (V 1)	Fred Booysen	f Booysen	<i>T Baloyi</i>

## 5. DECLARATION OF AUTHENTICITY

I, \_\_\_\_\_, ID number \_\_\_\_\_

hereby declare that the contents of this logbook are entirely my own work with the exception of the items detailed below on this page.

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Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ in

the year \_\_\_\_\_.

\_\_\_\_\_ (Student's signature)

Enquiries concerning the workplace component may be directed to the Programme Coordinator.

**6. RECORD OF WORK INTEGRATED LEARNING – LEVELS OF PROGRESSION AT OPERATIONAL/ SUPERVISORY/ MANGERIAL LEVELS**

<b>OPERATIONS</b>			
	<b>ACTIVITIES OPERATIONS</b>	<b>ACTIVITIES SUPERVISORY</b>	<b>ACTIVITIES MANAGEMENT</b>
<b>Implementation</b>	<b>OP-O-01.1</b> Work to a given plan	<b>OP-S-01.1</b> Supervise to ensure operational targets are being met	<b>OP-M-01.1</b> Compile a weekly schedule for staff in the shop
			<b>OP-M-01.2</b> Implement and adjust a monthly schedule for staff in the shop.
<b>Meetings</b>	<b>OP-O-02.1</b> Participate in a planning meeting	<b>OP-S-02.1</b> Compile action lists based on operational meetings	<b>OP-M-02.1</b> Chair an operational meeting

<b>HUMAN RESOURCES</b>			
	<b>ACTIVITIES OPERATIONS</b>	<b>ACTIVITIES SUPERVISORY</b>	<b>ACTIVITIES MANAGEMENT</b>
<b>Teams work</b>	<b>HR-O-01.1</b> Participate in a team	<b>HR-S-01.1</b> Motivate and supervise team activities to achieve objectives	<b>HR-M-01.1</b> Manage team activities to achieve objectives
<b>Supervising staff</b>		<b>HR-S-02.1</b> Resolve a performance problem issue	<b>HR-M-02.1</b> Lead disciplinary processes
		<b>HR-S-02.2</b> Participate in disciplinary processes	
<b>Staff induction</b>	<b>HR-O-02.1</b> Participate in own orientation	<b>HR-S-03.1</b> Prepare for an induction	<b>HR-M-03.1</b> Manage an induction
		<b>HR-S-03.2</b> Conduct an induction	

HOUSEKEEPING			
	ACTIVITIES OPERATIONS	ACTIVITIES SUPERVISORY	ACTIVITIES MANAGEMENT
Health and safety	<b>HK-O-01.1</b> Implement standards per operational procedure	<b>HK-S-01.1</b> Evaluate and identify areas not up to standard	<b>HK-M-01.1</b> Chair a health and safety meeting
	<b>HK-O-01.2</b> Attend a health and safety meeting		<b>HK-M-01.2</b> Manage health and safety activities
Cleaning	<b>HK-O-02.1</b> Follow a checklist of areas to be cleaned daily, weekly and monthly	<b>HK-S-02.1</b> Compile a cleaning checklist	<b>HK-M-02.1</b> Manage cleaning activities
		<b>HK-S-02.2</b> Check staffs' cleaning per checklist and recommend improvements	

STAKEHOLDER RELATIONS			
	ACTIVITIES OPERATIONS	ACTIVITIES SUPERVISORY	ACTIVITIES MANAGEMENT
Internal stakeholder relations	<b>SR-O-01.1</b> Compile a list of stakeholders	<b>SR-S-01.1</b> Evaluate the performance of 1 internal stakeholder	<b>SR-M-01.1</b> Evaluate performance of 1 internal stakeholder
			<b>SR-M-01.2</b> Maintain relations with 1 internal stakeholder
External stakeholder relations	<b>SR-O-02.1</b> Compile a list of stakeholders	<b>SR-S-02.1</b> Evaluate the performance of 1 external stakeholder	<b>SR-M-02.1</b> Evaluate performance of 1 external stakeholder
			<b>SR-M-02.2</b> Maintain relations with 1 external stakeholder

<b>STOCK</b>			
	<b>ACTIVITIES OPERATIONS</b>	<b>ACTIVITIES SUPERVISORY</b>	<b>ACTIVITIES MANAGEMENT</b>
<b>Control stock</b>	<b>S-O-01.1</b> Participate in stock receiving and complete documentation	<b>S-S-01.1</b> Supervise stock receiving and check documentation.	<b>S-M-01.1</b> Manage and evaluate stock receiving procedures. Provide a report with recommendations.
	<b>S-O-01.2</b> Participate in a unit count	<b>S-S-01.2</b> Plan and implement a unit count	<b>S-M-01.2</b> Evaluate unit counts and prepare a report
	<b>S-O-01.3</b> Participate in a stocktake	<b>S-S-01.3</b> Participate in stocktakes Supervise staff members during a stocktake	<b>S-M-01.3</b> Plan and implement stocktakes
<b>Manage/ Supervise stock levels</b>	<b>S-O-02.1</b> Assist in identifying under and over stocks	<b>S-S-02.1</b> Evaluate overs and shorts reports presented by staff	<b>S-M-02.1</b> Manage stock ordering
		<b>S-S-02.2</b> Recommend actions to eliminate over stocks	<b>S-M-02.2</b> Evaluate the supervisors stock control procedures
		<b>S-S-02.3</b> Recommend orders	
<b>Stock range</b>	<b>S-O-03.1</b> Collect data from customers regarding suggested improvements to range	<b>S-S-03.1</b> Propose new products	<b>S-M-03.1</b> Create action plan and motivate to improve the range of stock
<b>Merchandising and layout</b>	<b>S-O-04.1</b> Pack and display merchandise as per operating standards and instructions	<b>S-S-04.1</b> Evaluate merchandise displays	<b>S-M-04.1</b> Recommend improvements to the merchandising layout and display of the store
<b>Buying / ordering of stock</b>	<b>S-O-05.1</b> Identify products that require replenishment		



BOTTOM LINE			
	ACTIVITIES OPERATIONS	ACTIVITIES SUPERVISORY	ACTIVITIES MANAGEMENT
Performance reports		<b>BL-S-01.1</b> Analyse the last 4 months' sales actual to budget and the previous year	<b>BL-M-01.1</b> Evaluate the impact of the action plans implemented by the supervisor to improve the bottom line of the store
		<b>BL-S-01.2</b> Identify areas that require action	

SALES AND MARKETING			
	ACTIVITIES OPERATIONS	ACTIVITIES SUPERVISORY	ACTIVITIES MANAGEMENT
Sales activities	<b>S&amp;M-O-01.1</b> Understand the daily, weekly and monthly targets for the salesperson and the department	<b>S&amp;M-S-01.1</b> Allocate targets per sales person	<b>S&amp;M-M-01.1</b> Evaluate supervisors break down of sales targets
		<b>S&amp;M-S-01.2</b> Compare individual and department actual results against target and motivate staff	<b>S&amp;M-M-01.2</b> Evaluate supervisor's performance in improving sales activities of staff
Promotions	<b>S&amp;M-O-02.1</b> Participate in promotional displays and activities	<b>S&amp;M-S-02.1</b> Allocate promotional activities and supervise implementation.	<b>S&amp;M-M-02.1</b> Manage implementation of promotional activities
		<b>S&amp;M-S-02.2</b> Supervise the displays and stock during a promotion	<b>S&amp;M-M-02.2</b> Evaluate and report on promotional activities, displays and ticketing
			<b>S&amp;M-M-02.3</b> Evaluate and report on the success of the promotion in terms of customer interest and sales results

<b>Customer service</b>	<b>S&amp;M-O-03.1</b> Implement customer service standards	<b>S&amp;M-S-03.1</b> Evaluate customer service	<b>S&amp;M-M-03.1</b> Develop a checklist to evaluate impact points with the customer
	<b>S&amp;M-O-03.2</b> Record customer queries	<b>S&amp;M-S-03.2</b> Develop an action plan to improve shortfalls identified	<b>S&amp;M-M-03.2</b> Evaluate the supervisor's ability to improve customer service.
		<b>S&amp;M-S-03.3</b> Resolve customer complaints	

<b>RISKS AND ASSETS</b>			
	<b>ACTIVITIES OPERATIONS</b>	<b>ACTIVITIES SUPERVISORY</b>	<b>ACTIVITIES MANAGEMENT</b>
<b>Risk management</b>	<b>R&amp;A-O-01.1</b> Identify products susceptible to theft in the store	<b>R&amp;A-S-01.1</b> Develop a checklist to evaluate the areas of risk in the store	<b>R&amp;A-M-01.1</b> Evaluate accuracy of Supervisors analysis of risk potential and prevention in the store and report
	<b>R&amp;A-O-01.2</b> Minimise shrinkage and losses in the store	<b>R&amp;A-S-01.2</b> Evaluate risks to the store and propose action to min. losses.	<b>R&amp;A-M-01.2</b> Evaluate accuracy of Supervisors analysis of shrinkage potential and prevention in the store and report
		<b>R&amp;A-S-01.3</b> Communicate and allocate actions from the action plan	<b>R&amp;A-M-01.3</b> Evaluate actions proposed by supervisor and authorise action to minimise theft of products susceptible to theft in the store
		<b>R&amp;A-S-01.4</b> Minimise risks to the store.	<b>R&amp;A-M-01.4</b> Evaluate the implementation of the supervisor's action plan to minimise shrinkage and losses in the store
<b>Asset management</b>	<b>R&amp;A-O-02.1</b> Work with fixed and current assets in a manner that minimises damage	<b>R&amp;A-S-02.1</b> Identify assets under maintenance contract	<b>R&amp;A-M-02.1</b> Evaluate the use of fixed assets

		<b>R&amp;A-S-02.2</b> Draw up fixed assets register	<b>R&amp;A-M-02.2</b> Evaluate the handling of current assets
		<b>R&amp;A-S-02.3</b> Implement and supervise a fixed asset count	<b>R&amp;A-M-02.3</b> Evaluate the fixed assets register drawn up by the supervisor.

FINANCE AND ADMIN			
	ACTIVITIES OPERATIONS	ACTIVITIES SUPERVISORY	ACTIVITIES MANAGEMENT
Cash management	<b>F&amp;A-O-01.1</b> Operate a till	<b>F&amp;A-S-01.1</b> Cash up tills and follow up on till shortages and overs	<b>F&amp;A-M-01.1</b> Evaluate management of cash in the store
	<b>F&amp;A-O-01.2</b> Control own till change	<b>F&amp;A-S-01.2</b> Manage change	
	<b>F&amp;A-O-01.3</b> Control payments for sales on a till.	<b>F&amp;A-S-01.3</b> Prepare cash for deposit and complete administration for cash deposits	
Filing	<b>F&amp;A-O-02.1</b> Process filing as per the SOPs	<b>F&amp;A-S-02.1</b> Supervise filing	
Shopping centre management			<b>F&amp;A-M-02.1</b> Chair tenant's meetings
Product knowledge	<b>F&amp;A-O-03.1</b> Participate in product knowledge training	<b>F&amp;A-S-03.1</b> Implement product knowledge training	<b>F&amp;A-M-03.1</b> Evaluate staff product knowledge.
		<b>F&amp;A-S-03.2</b> Develop and test staff product knowledge	

## **RECORD OF WORK INTEGRATED LEARNING**

### **- OPERATIONAL LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-O: OPERATIONS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENT	VERIFICATION		
			Comment	Date	Signature
<b>OP-O-01: Implementation</b>	<b>OP-O-01.1</b> Work to a given plan	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>a report by the manager detailing tasks completed and confirming work implemented within agreed timeframes.</i></li> </ul>			
<b>OP-O-02: Meetings</b>	<b>OP-O-02.1</b> Participate in a planning meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>A report compiled by the student reflecting his/her participation in and contribution to operational meetings, signed by the student's superior.</i></li> </ul>			

**HR-O: HUMAN RESOURCES**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-O-01: Teams work</b>	<b>HR-O-01.1</b> Participate in a team	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence confirming that the student contributed to the efforts of the team.</i></li> </ul>			
<b>HR-O-02: Staff orientation</b>	<b>HR-O-02.1</b> Participate in own orientation	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence indicating the process followed for orientation.</i></li> </ul>			

**HK-O: HOUSEKEEPING**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HK-O-01: Health and safety</b>	<b>HK-O-01.1</b> Implement standards per operational procedure	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards per operational procedure.</i></li> </ul>			
	<b>HK-O-01.2</b> Attend a health and safety meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The minutes of the meeting noting that the student was in attendance.</i></li> </ul>			
<b>HK-O-02: Cleaning</b>	<b>HK-O-02.1</b> Follow a checklist of areas to be cleaned daily, weekly and monthly	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards per operational procedure.</i></li> </ul>			

**SR-O: STAKEHOLDER RELATIONS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-O-01: Internal stakeholder relations</b>	<b>SR-O-01.1</b> Compile a list of stakeholders	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Provide list of internal stakeholders.</i></li> </ul>			
<b>SR-O-02: External stakeholder relations</b>	<b>SR-O-02.1</b> Compile a list of stakeholders	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Provide list of external stakeholders.</i></li> </ul>			

**S-O: STOCK**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S-O-01: Control stock</b>	<b>S-O-01.1</b> Participate in stock receiving and complete documentation	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copies authenticated by the manager of all documents used to receive and check the deliveries.</i></li> </ul>			
	<b>S-O-01.2</b> Participate in unit counts	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>List products counted.</i></li> </ul>			
	<b>S-O-01.3</b> Participate in a stocktake (if applicable)	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student participated in a stocktake.</i></li> </ul>			
<b>S-O-02: Manage stock levels</b>	<b>S-O-02.1</b> Assist in identifying under and over stocks	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Completed list of under and over stocks as confirmed as being correct by the manager.</i></li> </ul>			
<b>S-O-03: Stock range</b>	<b>S-O-03.1</b> Collect data from customers regarding suggested improvements to range	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>List of suggestions collected.</i></li> </ul>			
<b>S-O-04: Merchandising and layout</b>	<b>S-O-04.1</b> Pack and display merchandise as per operating standards and instructions	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence (photos).</i></li> </ul>			

<b>S-O-05: Buying / ordering of stock</b>	<b>S-O-05.1</b> Identify products that require replenishment	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence listing identified shortage of stock.</i></li> </ul>			
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**S&M-O: SALES AND MARKETING**

	<b>ACTIVITIES OPERATIONS</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>S&amp;M-O-01: Sales activities</b>	<b>S&amp;M-O-01.1</b> Analyse and understand the daily, weekly and monthly targets for the salesperson and the department	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Monthly sales budget along with calculations and breakdown for weeks of the month and targets set per department or category.</i></li> </ul>			
<b>S&amp;M-O-02: Promotions</b>	<b>S&amp;M-O-02.1</b> Participate in promotional displays and activities	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Photographic evidence of the student participating in promotional displays and activities.</i></li> </ul>			
<b>S&amp;M-O-03: Customer service</b>	<b>S&amp;M-O-03.1</b> Implement customer service standards	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence stating that the student implemented standards as required.</i></li> </ul>			
	<b>S&amp;M-O-03.2</b> Record customer queries	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Record of customer queries and complaints.</i></li> </ul>			



**R&A-O: RISKS AND ASSETS**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-O-01: Risk management</b>	<b>R&amp;A-O-01.1</b> Identify products susceptible to theft in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence showing the products that have been identified and confirmed by the manager as being correct.</li> </ul>			
	<b>R&amp;A-O-01.2</b> Minimise shrinkage and losses in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Report by the manager stating that the student works in a manner that minimises shrinkage and losses in a store.</li> </ul>			
<b>R&amp;A-O-02: Assets</b>	<b>R&amp;A-O-02.1</b> Work with fixed and current assets in a manner that minimises damage	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence indicating that the student worked with both current and fixed assets in a manner that minimises the shrinkage and losses.</li> </ul>			

**F&A-O: FINANCE AND ADMIN**

	ACTIVITIES OPERATIONS	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>F&amp;A-O-01: Cash</b>	<b>F&amp;A-O-01.1</b> Operate the till	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence in the form of a report from the manager noting the days and times the student operated the till</li> <li>Documented proof of students' overs and shorts on the till.</li> </ul>			

	<b>F&amp;A-O-01.2</b> Control own till change	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report noting that the student controlled her/ his own till change and processed their cash up at the till</i></li> </ul>			
	<b>F&amp;A-O-01.3</b> Control payments for sales on a till.	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report noting that the student accepted payment and controlled tender.</i></li> </ul>			
<b>F&amp;A-O-02: Filing</b>	<b>F&amp;A-O-02.1</b> Process filing as per the SOPs	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence that the student participated in filing at the store</i></li> </ul>			
<b>F&amp;A-O-03: Product knowledge</b>	<b>F&amp;A-O-03.1</b> Participate in product knowledge training	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report by the manager stating that the student has been questioned on products and was able to demonstrate sufficient knowledge of the product.</i></li> </ul>			

## **RECORD OF WORK INTEGRATED LEARNING**

### **- SUPERVISORY LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-S: OPERATIONS**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>OP-S-01: Operations supervision</b>	<b>OP-S-01.1</b> Supervise to ensure operational targets are being met	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documentary evidence from the students' superior detailing the student's success in supervising the implementing of operational plans and achieving operational goals.</li> </ul>			
<b>OP-S-02: Meetings</b>	<b>OP-S-02.1</b> Compile action lists based on operational meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Action lists arising from operational meetings taking into account all operational requirements and staffing.</li> </ul>			

**HR-S: HUMAN RESOURCES**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-S-01: Teams work</b>	<b>HR-S-01.1</b> Motivate and supervise team activities to achieve objectives	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Documented evidence detailing how the student went about motivating the members of the team to achieve operational objectives.</li> <li>Documented evidence detailing how the student organised the members of the team and controlled their work to ensure the achievement of operational objectives and standards within required timeframes.</li> </ul>			

<b>HR-S-02: Supervising staff</b>	<b>HR-S-02.1</b> Resolve performance problem issues	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Notes compiled by the student explaining what performance issues were resolved.</li> </ul>			
	<b>HR-S-02.2</b> Participate in disciplinary processes	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Disciplinary records and minutes reflecting the student's participation in and contribution to all disciplinary processes in accordance with company procedure.</li> </ul>			
<b>HR-S-03: Staff induction</b>	<b>HR-S-03.1</b> Prepare for an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Checklist detailing all points to be covered in the induction and listing any documentation to be completed.</li> </ul>			
	<b>HR-S-03.2</b> Conduct an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Produce plans that details all topics covered in an induction.</li> </ul>			

**HK-S: HOUSEKEEPING**

	<b>ACTIVITIES SUPERVISORY</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>HK-S-01: Health and safety</b>	<b>HK-S-01.1</b> Evaluate and identify areas not up to standard	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Evaluation reports completed by the student along with an action plan by the student to address improvements needed.</li> </ul>			
<b>HK-S-02: Cleaning</b>	<b>HK-S-02.1</b> Compile a cleaning checklist	<i>Evidence:</i> <ul style="list-style-type: none"> <li>Checklists completed by the student.</li> </ul>			

	<b>HK-S-02.2</b> Check staffs' cleaning per checklist and recommend improvements	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Checklists completed by the student along with recommendations made by the student that are appropriate to addressing the improvements needed.</i></li> </ul>			
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**SR-S: STAKEHOLDER RELATIONS**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-S-01: Internal stakeholder relations</b>	<b>SR-S-01.1</b> Evaluate the performance of 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The reports accurately detail the performance of the internal stakeholders.</i></li> </ul>			
<b>SR-S-02: External stakeholder relations</b>	<b>SR-S-02.1</b> Evaluate the performance of 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The reports accurately detail the performance of the external stakeholders.</i></li> </ul>			

**S-S: STOCK**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S-S-01: Control stock</b>	<b>S-S-01.1</b> Supervise stock receiving and check documentation	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>The checklist details all in-store operational processes including the receiving and dispatch of stock, stock counts and recording of sales and returned merchandise.</i></li> </ul>			

	<b>S-S-01.2</b> Plan and implement a unit count	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student planned and implemented stock counts.</i></li> </ul>			
	<b>S-S-01.3</b> Participate in stock-takes if applicable. Supervise staff during a stocktake	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has participated in stocktakes.</i></li> </ul>			
<b>S-S-02: Supervise stock levels</b>	<b>S-S-02.1</b> Evaluate overs and shorts reports presented by staff	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report from the supervisor along with overs and shorts reports presented by staff showing his/her ability to evaluate the staffs' reports.</i></li> </ul>			
	<b>S-S-02.2</b> Recommend actions to eliminate over stocks	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report detailing action to be taken to eliminate over stocks with the manager's comments on the practicality of the student's proposal.</i></li> </ul>			
	<b>S-S-02.3</b> Recommend orders	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report by the manager detailing the accuracy of the recommended orders.</i></li> </ul>			
<b>S-S-03: Stock range</b>	<b>S-S-03.1</b> Propose new products	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report proposing new products based on information, collected by the staff, from customer queries.</i></li> </ul>			
<b>S-S-04: Merchandising and layout</b>	<b>S-S-04.1</b> Evaluate merchandise displays	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Evaluation of displays based on sales and recommend changes</i></li> </ul>			

		<i>based on these sales in order to improve turnover in the store.</i>			
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**BL-S: BOTTOM LINE**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>BL-S-01: Performance reports</b>	<b>BL-S-01.1</b> Analyse 4 months' sales actual to budget and the previous year	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Store performance reports along with the student's analyses and identification of entries that need to be improved.</i></li> </ul>			
	<b>BL-S-01.2</b> Identify areas that require action	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Draw up an action plan to improve entries identified on the store performance reports.</i></li> <li>• <i>Evaluate success of the action plans implemented based on the following few month's reports</i></li> </ul>			

**S&M-S: SALES AND MARKETING**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>S&amp;M-S-01: Sales activities</b>	<b>S&amp;M-S-01.1</b> Allocate targets per sales person	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Agenda and attendance register showing details of meetings of those sales staff that attended.</i></li> <li>• <i>Documentation showing how total sales have been broken up per sales assistant.</i></li> </ul>			



	<b>S&amp;M-S-01.2</b> Compare individual and department actual results against target and motivate staff	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence detailing the students' ability to motivate sales team to achieve sales targets.</i></li> <li>• <i>Documentary evidence showing targets and achievements by sales team and learner's evaluation of their achievements.</i></li> </ul>			
<b>S&amp;M-S-02: Promotions</b>	<b>S&amp;M-S-02.1</b> Allocate promotional activities and supervise implementation	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Copy of promotional implementation plan.</i></li> <li>• <i>Report from the manager confirming all promotional activities were completed to the right standards within the required time frames.</i></li> </ul>			
	<b>S&amp;M-S-02.2</b> Supervise the displays and stock during a promotion	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report by the manager confirming the manner in which the displays were managed throughout their lifespan and that they met organisational standards.</i></li> </ul>			
<b>S&amp;M-S-03: Customer service</b>	<b>S&amp;M-S-03.1</b> Evaluate customer service	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report detailing the standards of service observed.</i></li> </ul>			
	<b>S&amp;M-S-03.2</b> Develop action plans to improve shortfalls identified	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Action plans developed to improve the shopping experience for the customer.</i></li> </ul>			
	<b>S&amp;M-S-03.3</b> Resolve customer	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Records of complaints and their</i></li> </ul>			

	complaints	<i>resolutions as handled by the student.</i>			
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#### R&A-S: RISKS AND ASSETS

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-S-01: Risk management</b>	<b>R&amp;A-S-01.1</b> Develop checklist to evaluate the areas of risk in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The checklist signed off as being a complete list of areas of risk by the manager.</i></li> </ul>			
	<b>R&amp;A-S-01.2</b> Evaluate risks to the store and propose action to min. losses.	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence showing the evaluation carried out by the student and action plan proposed – signed off by the manager.</i></li> </ul>			
	<b>R&amp;A-S-01.3</b> Communicate and allocate actions from the action plan	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The agenda of the meeting held to implement the action plan to be signed off by staff who attended.</i></li> </ul>			
	<b>R&amp;A-S-01.4</b> Minimise risks to the store.	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Report by the manager confirming the action plan was implemented and has the ability to minimise losses to the store.</i></li> </ul>			
<b>R&amp;A-S-02: Asset management</b>	<b>R&amp;A-S-02.1</b> Identify the assets under maintenance contract	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>An accurate list of applicable assets.</i></li> </ul>			
	<b>R&amp;A-S-02.2</b> Draw up a fixed	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Fixed assets register confirmed by</i></li> </ul>			

	assets register	<i>the manager as being complete.</i>			
	<b>R&amp;A-S-02.3</b> Implement and supervise a fixed asset count	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence by the manager confirming the count was implemented according to organisational standards.</i></li> </ul>			

**F&A-S: FINANCE AND ADMIN**

	ACTIVITIES SUPERVISORY	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>F&amp;A-S-01:</b> <b>Cash management</b>	<b>F&amp;A-S-01.1</b> Cash up tills and follow up on till shortages and overs	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of a report from manager noting that tills were accurately cashed up and till discrepancies correctly handled.</i></li> </ul>			
	<b>F&amp;A-S-01.2</b> Manage change	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of a report from manager noting that the ordering of change for tills according to expected turnover was accurate.</i></li> </ul>			
	<b>F&amp;A-S-01.3</b> Prepare cash for deposit and complete administration for cash deposits	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence signed by the manager indicating that the student prepared the cash for administration and deposits.</i></li> </ul>			
<b>F&amp;A-S-02:</b> <b>Filing</b>	<b>F&amp;A-S-02.1</b> Supervise filing	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence, signed by the manager that the student</i></li> </ul>			

		<i>supervised filing in the store.</i>			
<b>F&amp;A-S-03: Product knowledge</b>	<b>F&amp;A-S-03.1</b> Implement product knowledge training	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence in the form of a report noting the student implementing product knowledge training.</i></li> </ul>			
	<b>F&amp;A-S-03.2</b> Develop and test staffs' product knowledge	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Draw up a questionnaire to assess staff's product knowledge on 2 specific products. Provide feedback on the product to staff</i></li> </ul>			

## **RECORD OF WORK INTEGRATED LEARNING**

### **– MANAGERIAL LEVEL TASKS & EVIDENCE REQUIREMENTS**

**OP-M: OPERATIONS**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>OP-M-01: Operations Planning</b>	<b>OP-M-01.1</b> Compile a weekly schedule for staff in the shop	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copies of the weekly operational plans showing staff schedule.</i></li> </ul>			
	<b>OP-M-01.2</b> Implement and adjust a weekly schedule for staff in the shop	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence from the manager detailing the student's success in implementing operational plans and achieving operational goals.</i></li> </ul>			
<b>OP-M-02: Meetings</b>	<b>OP-M-02.1</b> Chair an operational meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence in the form of an agenda and minutes of a meeting indicating that the student was the chair.</i></li> </ul>			

**HR-M: HUMAN RESOURCES**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>HR-M-01: Teams work</b>	<b>HR-M-01.1</b> Manage team activities to achieve objectives	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documented evidence detailing how the student went about motivating the members of the team to achieve operational objectives.</i></li> <li><i>Documented evidence detailing how the student organised the members of the team and</i></li> </ul>			

		<i>controlled their work to ensure the achievement of operational objectives and standards within required timeframes.</i>			
<b>HR-M-02: Supervising staff</b>	<b>HR-M-02.1</b> Lead disciplinary processes	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Notes compiled by the student explaining what performance issues were resolved and how this was done.</i></li> <li>• <i>Disciplinary records and minutes reflecting the student's participation in and contribution to all disciplinary processes in accordance with procedures.</i></li> </ul>			
<b>HR-M-03: Staff induction</b>	<b>HR-M-03.1</b> Manage an induction	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on the induction checklist prepared by the supervisor on how well the supervisor implemented an induction.</i></li> </ul>			

**HK-M: HOUSEKEEPING**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>HK-M-01: Health and safety</b>	<b>HK-M-01.1</b> Chair a health and safety meeting	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence of the student having chaired a health, safety meeting.</i></li> </ul>			
	<b>HK-M-01.2</b> Manage health and safety activities	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence of the student having managed health,</i></li> </ul>			

		<i>safety and housekeeping to required standards.</i>			
<b>HK-M-02:</b> Cleaning	<b>HK-M-02.1</b> Manage cleaning activities	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li><i>the evaluation of the checklist designed by the supervisor</i></li> <li><i>evaluation of the supervisor's report on the stores housekeeping standards</i></li> <li><i>the success of the supervisor in improving housekeeping standards.</i></li> </ul>			

#### SR-M: STAKEHOLDER RELATIONS

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>SR-M-01:</b> <b>Internal stakeholder relations</b>	<b>SR-M-01.1</b> Evaluate performance of 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The report accurately details the performance of the internal stakeholders.</i></li> </ul>			
	<b>SR-M-01.2</b> Maintain relations with 1 internal stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Documentary evidence detailing the steps taken by the student to build or maintain effective relations with the internal stakeholder.</i></li> </ul>			
<b>SR-M-02:</b> <b>External stakeholder relations</b>	<b>SR-M-02.1</b> Evaluate performance of 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>The report accurately details the performance of the external stakeholders and is signed off by the manager.</i></li> </ul>			



	<b>SR-M-02.2</b> Maintain relations with 1 external stakeholder	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence detailing the steps taken by the student to build or maintain effective relations with an external stakeholder</i></li> </ul>			
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**S-M: STOCK**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>S-M-01: Control stock</b>	<b>S-M-01.1</b> Manage and evaluate stock receiving procedures. Provide a report with recommendations	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has checked all these in store processes monthly and taken action to correct processes where they have not been followed correctly.</i></li> </ul>			
	<b>S-M-01.2</b> Evaluate unit counts and prepare a report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documented evidence showing that the student has checked all these in store processes and taken action to correct processes where they have not been followed correctly.</i></li> </ul>			
	<b>S-M-01.3</b> Plan and implement stocktakes (if applicable)	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary feedback from the manager that the student had participated and planned a stocktake.</i></li> </ul>			
<b>S-M-02: Manage stock</b>	<b>S-M-02.1</b> Manage stock	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Copies of orders placed by the</i></li> </ul>			

<b>levels</b>	ordering	<i>student and documentary evidence showing how these order were calculated.</i>			
	<b>S-M-02.2</b> Evaluate the supervisors stock control procedures	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li><i>the evaluation of the orders recommended by the supervisor to reduce stock shortages</i></li> <li><i>the evaluation of the suggestions put forward by the supervisor to clear over stocks.</i></li> </ul>			
<b>S-M-03: Stock range</b>	<b>S-M-03.1</b> Create action plan and motivate to improve the range of stock	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copy of the motivation written by the student showing the correct use of terminology and giving sound evidence that the proposals could improve the store's sales and margins.</i></li> </ul>			
<b>S-M-04: Merchandising and layout</b>	<b>S-M-04.1</b> Recommend improvements to the merchandising layout and display of the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Copy of the motivation written by the student showing the correct use of terminology and giving sound evidence that the proposals could improve the store's sales and margins.</i></li> </ul>			

**BL-M: BOTTOM LINE**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>BL-M-01: Performance</b>	<b>BL-M-01.1</b> Evaluate the impact of	<i>Evidence:</i> <ul style="list-style-type: none"> <li><i>Store performance reports along</i></li> </ul>			

<b>reports</b>	the action plans implemented by the supervisor to improve the bottom line of the store	<i>with the supervisors' analyses evaluating the entries that need to be improved.</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence evaluating the success of the action plans implemented by the supervisor.</i></li> </ul>			
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**S&M-M: SALES AND MARKETING**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>S&amp;M-M-01: Sales activities</b>	<b>S&amp;M-M-01.1</b> Evaluate supervisors break down of sales targets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence commenting on the accuracy of the supervisors breaking down of targets.</i></li> </ul>			
	<b>S&amp;M-M-01.2</b> Evaluate supervisor's performance in improving sales activities of staff	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>The evaluation of the supervisor's performance</i></li> <li>• <i>Minutes of the meeting communicating effectiveness of the supervisor's activities</i></li> <li>• <i>Details of any corrective action required from the supervisor.</i></li> </ul>			
<b>S&amp;M-M-02: Promotions</b>	<b>S&amp;M-M-02.1</b> Manage implementation of promotional activities	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>Items on promotion and how they need to be displayed</i></li> <li>• <i>Minutes of meeting with supervisor to communication promotional requirements.</i></li> </ul>			

	<b>S&amp;M-M-02.2</b> Evaluate and report on promotional activities, displays and ticketing	<i>Evidence: Report by the student detailing:</i> <ul style="list-style-type: none"> <li>• <i>the process followed to manage the implementation of promotional activity</i></li> <li>• <i>feedback given to the supervisor on his or her supervision of promotional activities.</i></li> </ul>			
	<b>S&amp;M-M-02.3</b> Evaluate and report on the success of the promotion in terms of customer interest and sales results	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating the success of the promotions.</i></li> </ul>			
<b>S&amp;M-M-03: Customer service</b>	<b>S&amp;M-M-03.1</b> Develop a checklist to evaluate impact points with the customer	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Checklist created to evaluate all areas of customer service within the store, signed off by the students' superior confirming that all areas are included.</i></li> </ul>			
	<b>S&amp;M-M-03.2</b> Evaluate the supervisor's ability to improve customer service.	<i>Evidence: Documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>evaluation of the supervisor's report on the stores customer service standards</i></li> <li>• <i>the success of the supervisor in improving customer service standards.</i></li> </ul>			

**R&A-M: RISKS AND ASSETS**

	ACTIVITIES MANAGEMENT	EVIDENCE REQUIREMENTS	VERIFICATION		
			Comment	Date	Signature
<b>R&amp;A-M-01: Risk management</b>	<b>R&amp;A-M-01.1</b> Evaluate accuracy of Supervisors analyses of risk potential and prevention in the store and report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' analysis and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.2</b> Evaluate accuracy of Supervisors analyses of shrinkage potential and prevention in the store and report	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' analysis and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.3</b> Evaluate actions proposed by supervisor and authorise action to minimise theft of products susceptible to theft in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisors' proposals and any corrections required.</i></li> </ul>			
	<b>R&amp;A-M-01.4</b> Evaluate the implementation of the supervisors' action plan to minimise shrinkage and losses in the store	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Report evaluating supervisor's implementation and any corrective action required.</i></li> </ul>			

<b>R&amp;A-M-02: Asset management</b>	<b>R&amp;A-M-02.1</b> Evaluate the use of fixed assets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on how well fixed assets are used and maintained in the store.</i></li> <li>• <i>List corrective action taken.</i></li> </ul>			
	<b>R&amp;A-M-02.2</b> Evaluate the handling of current assets	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>A report on how well current assets are handled and the damages suffered by the store.</i></li> <li>• <i>List corrective action taken.</i></li> </ul>			
	<b>R&amp;A-M-02.3</b> Evaluate the fixed assets register drawn up by the supervisor.	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• <i>Documentary evidence showing the evaluation of the fixed assets register drawn up by the supervisor indicating any corrections required.</i></li> </ul>			

**F&A-M: FINANCE AND ADMIN**

	<b>ACTIVITIES MANAGEMENT</b>	<b>EVIDENCE REQUIREMENTS</b>	<b>VERIFICATION</b>		
			<b>Comment</b>	<b>Date</b>	<b>Signature</b>
<b>F&amp;A-M-01: Cash management</b>	<b>F&amp;A-M-01.1</b> Evaluate management of cash in the store	<i>Evidence: documentary evidence showing:</i> <ul style="list-style-type: none"> <li>• <i>cash up documentation is checked for accuracy</i></li> <li>• <i>a report evaluating the safe handling and keeping of takings and change in the store</i></li> <li>• <i>an action plan detailing improvements proposed to ensure better handling and safe keeping of cash in the store</i></li> </ul>			

		<ul style="list-style-type: none"> <li>• A report detailing how the student managed till overs and shorts.</li> </ul>			
<b>F&amp;A-M-02: Shopping centre management</b>	<b>F&amp;A-M-02.1</b> Chair tenant's meetings	<i>Evidence:</i> <ul style="list-style-type: none"> <li>• Minutes of meeting which indicate that the student was the chair.</li> </ul>			
<b>F&amp;A-M-03: Product knowledge</b>	<b>F&amp;A-M-03.1</b> Evaluate staff product knowledge.	<i>Evidence: Documentary evidence as follows:</i> <ul style="list-style-type: none"> <li>• A questionnaire used to evaluate staffs' product knowledge</li> <li>• A report on the level of staffs' product knowledge</li> <li>• Feedback to the supervisor detailing any actions needed to improve staff product knowledge.</li> </ul>			

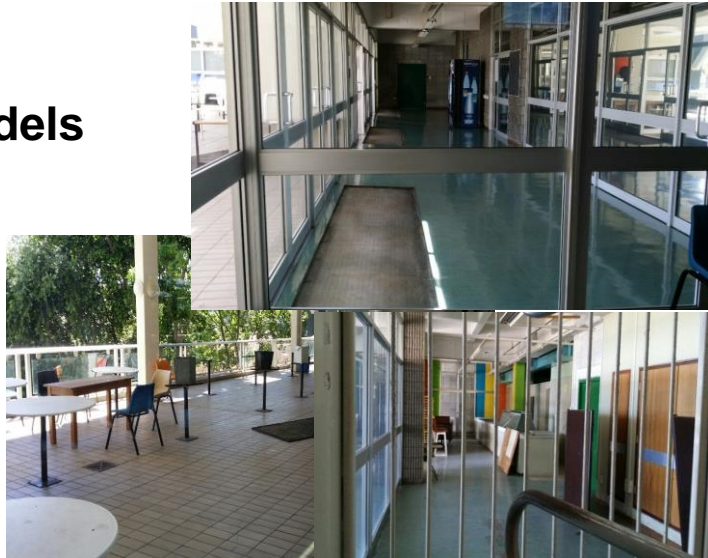
**ANNEXURE E:****Draft models**



## ANNEXURE E: Draft models

# Work Integrated learning via an on-campus retail shop

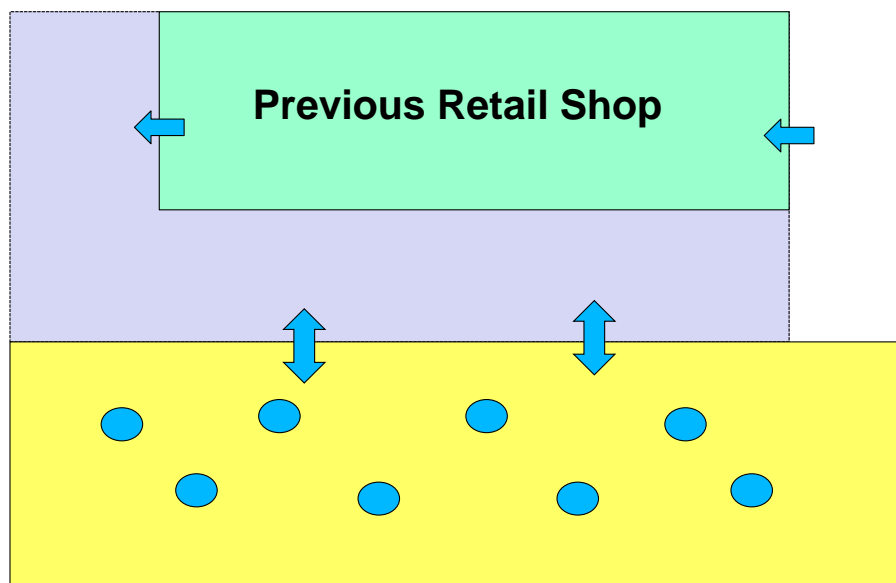
- ❑ Background
- ❑ Business Models
- ❑ Management
- ❑ Training
- ❑ Research
- ❑ Summary



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1

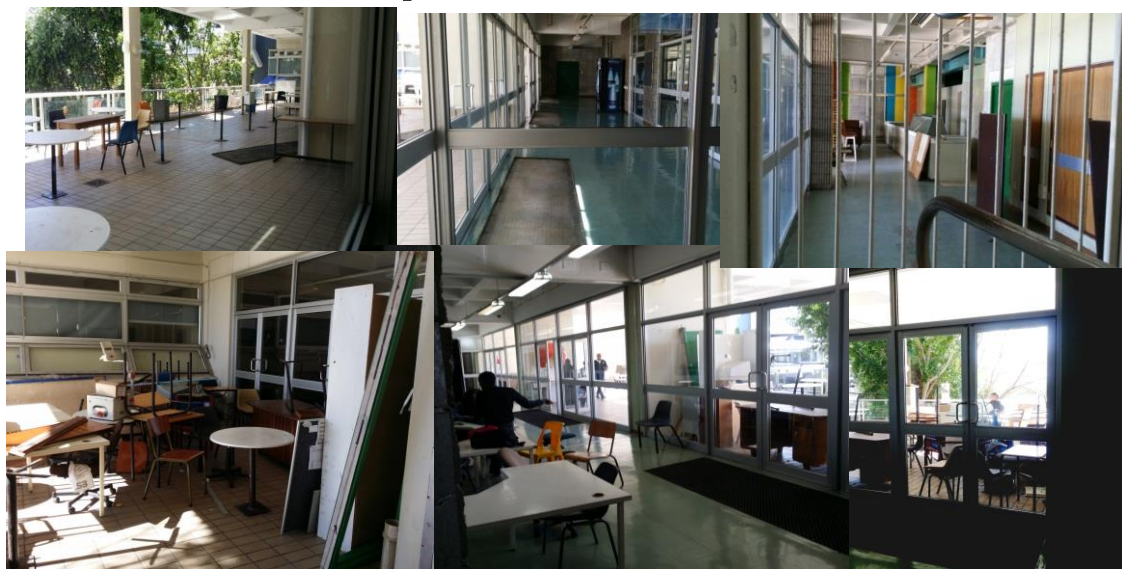
## Background Location – Space - Areas



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2

## Background Space - Areas



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3

# Retail Lab

## Business Models

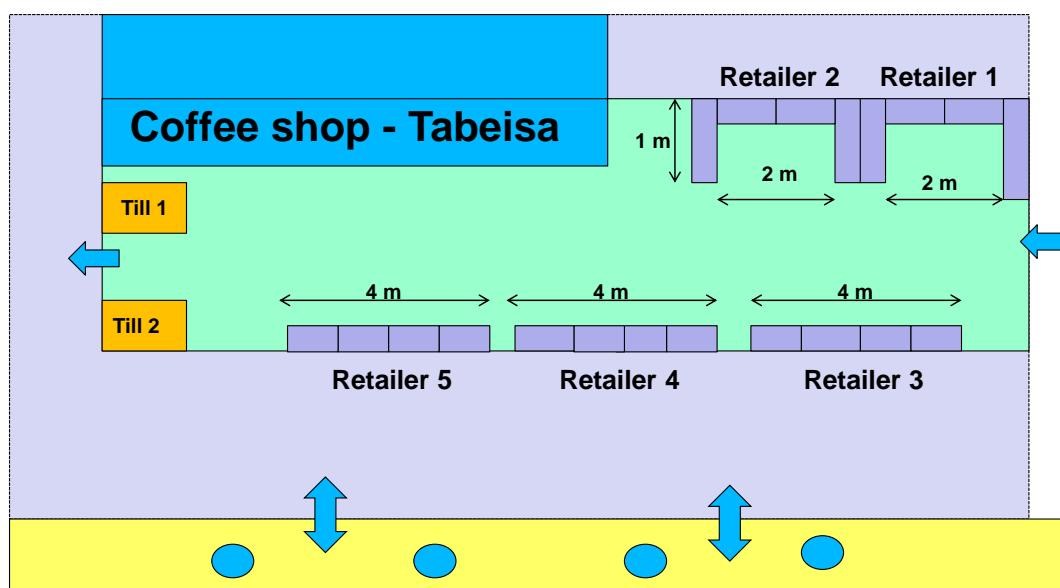
The following possible business models were identified after consultation with the retail industry;

- **Model 1: Mini Mall – Shelves in store**
  - A mini mall with different retailers responsible for their own mini stores.
  - Allocated shelves and space – competing on own brand products.
- **Model 2: One Departmental Store – Different retailers**
  - One store consisting of a coffee shop with different departments
  - Each interested retailer responsible for one department on allocated shelves / spaces - No competing of products and cooperation on workplace learning.
- **Model 3: Mini Mall - Independent stores**
  - One shopping centre with independent stores
  - Mini mall board
  - Cooperation between retailers on workplace learning and research
- **Model 4: One Independent Retailer for operations**
  - One independent stores – open tender for concept and size
  - Board for cooperation between retailers on workplace learning and research.

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4

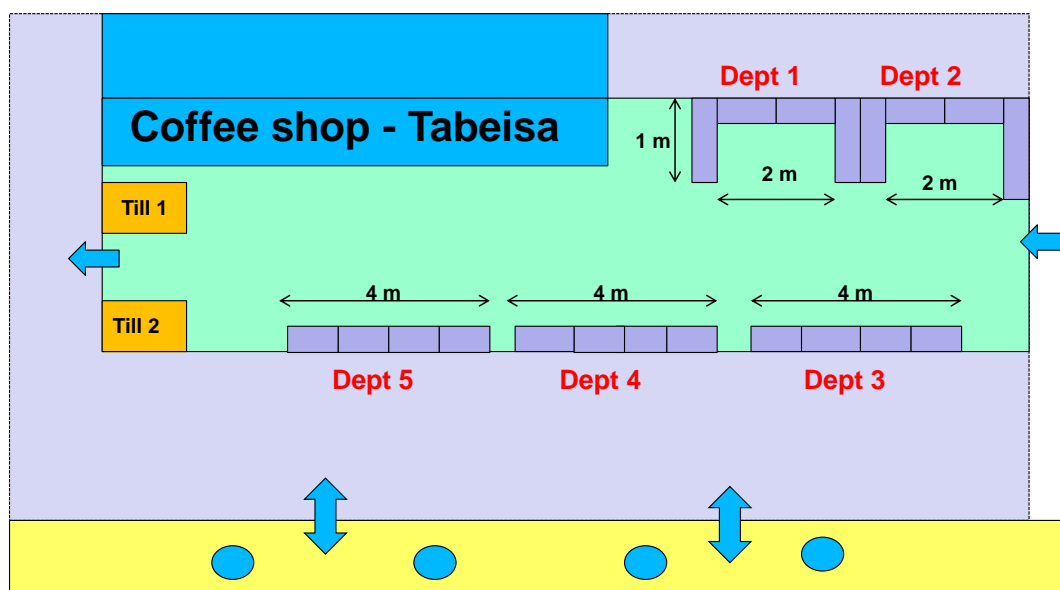
## Business Model 1 – Mini Mall shelves



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5

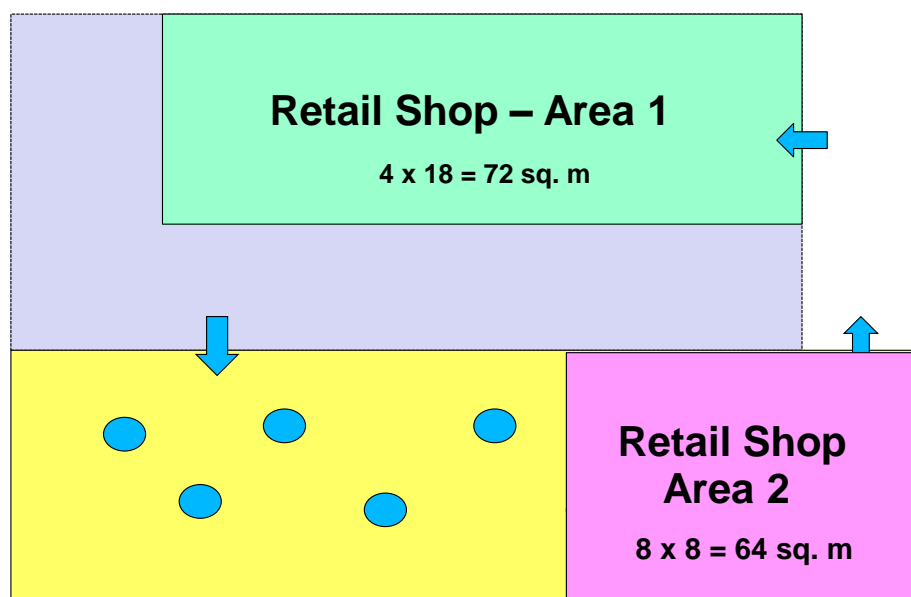
## Business Model 2 – Departmental store



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6

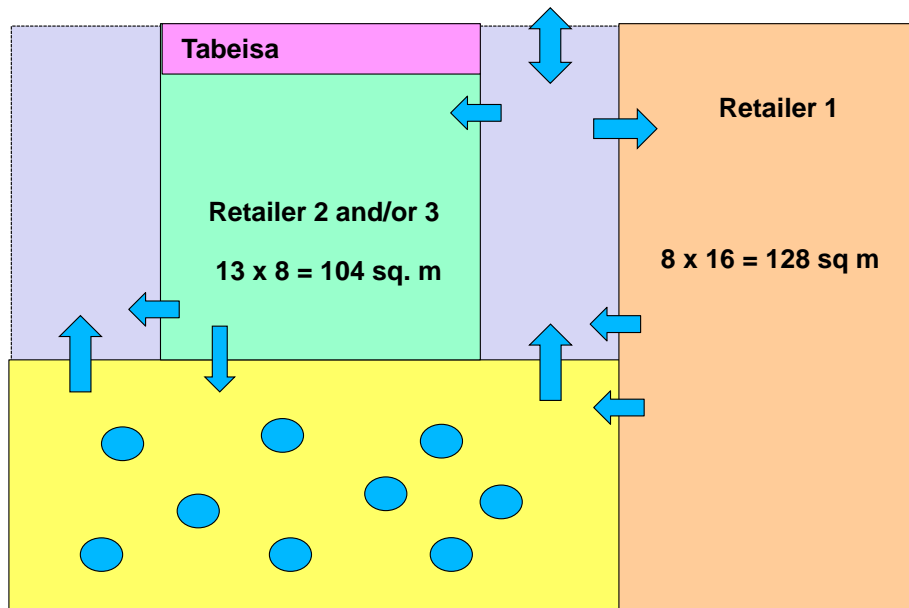
## Business Model 3 – Mini Mall – Independent stores Option 1



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7

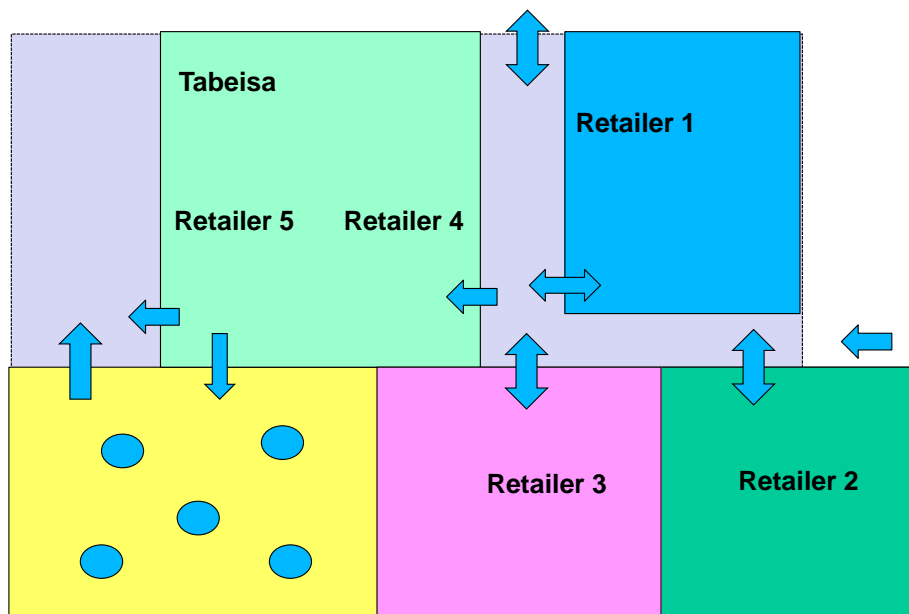
### Business Model 3 – Mini Mall – Independent stores Option 2



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8

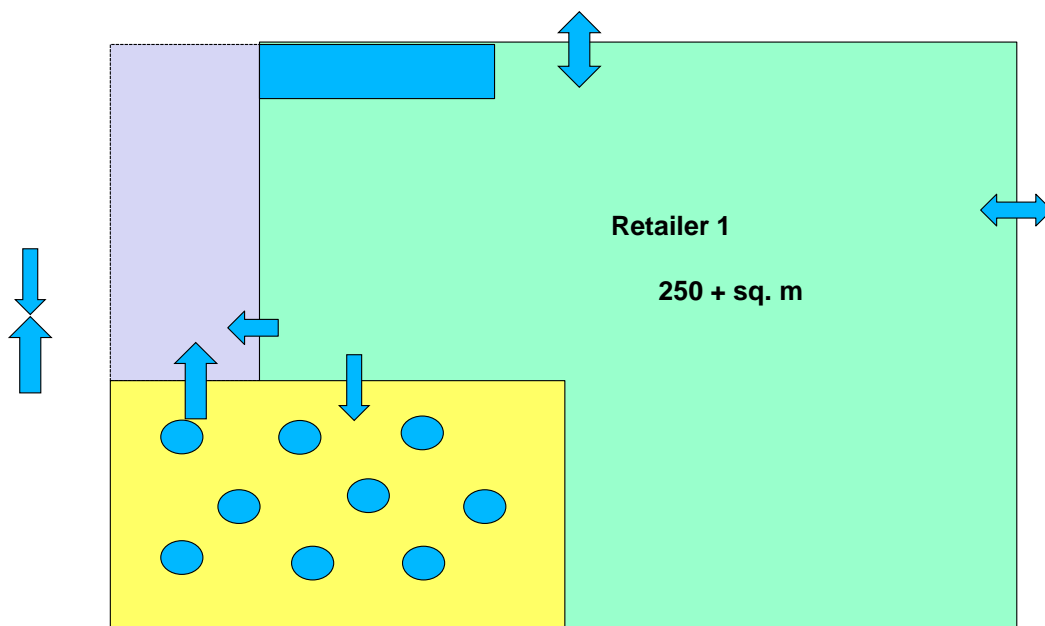
### Business Model 3 – Mini Mall – Independent stores Option 3



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9

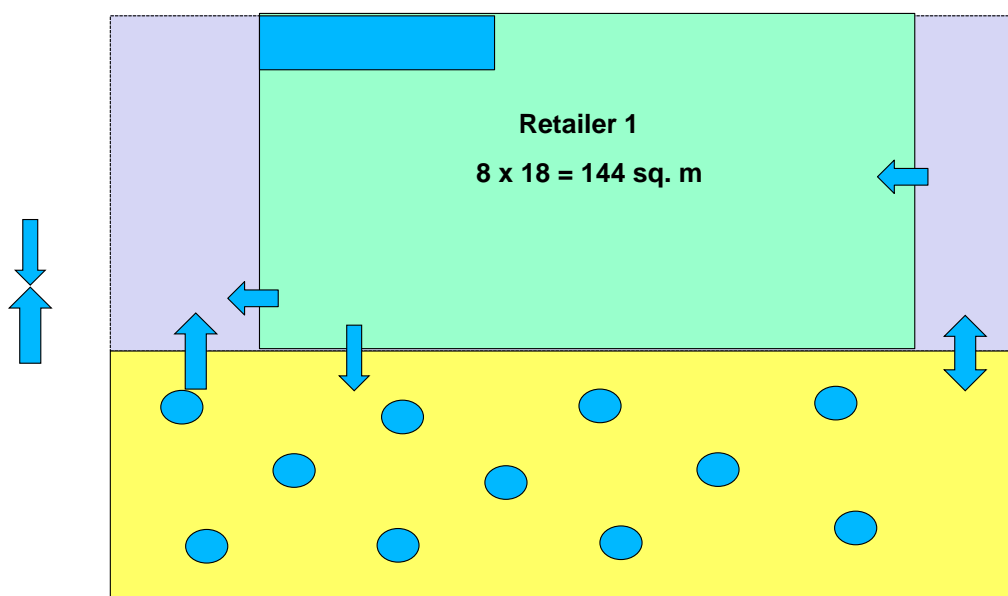
### Business Model 4 – One Independent store Option 1



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10

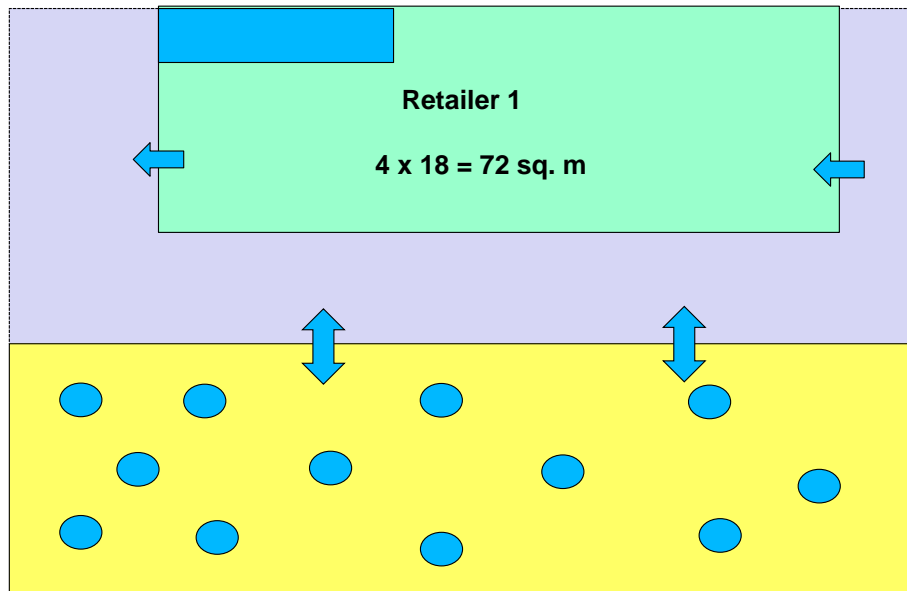
### Business Model 4 – One Independent store Option 2



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11

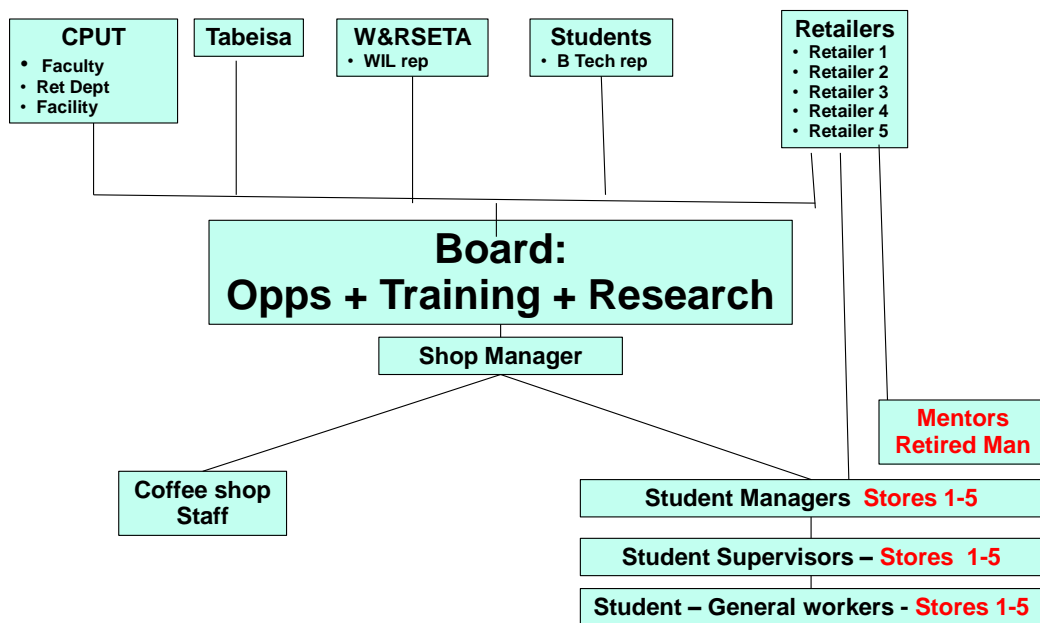
## Business Model 4 – One Independent store Option 3



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12

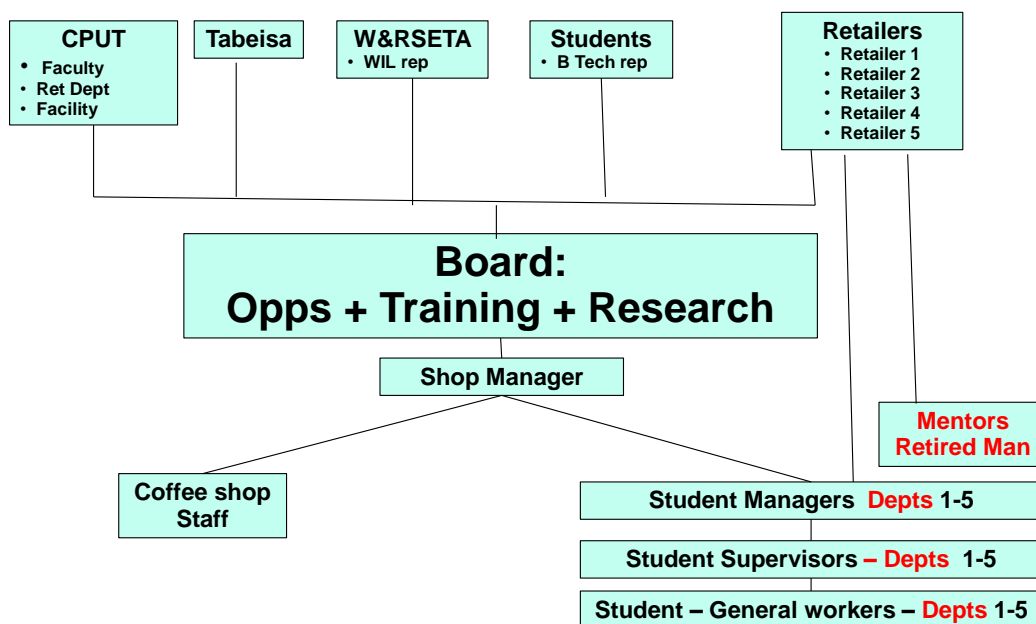
## Management Model 1 – Mini Mall



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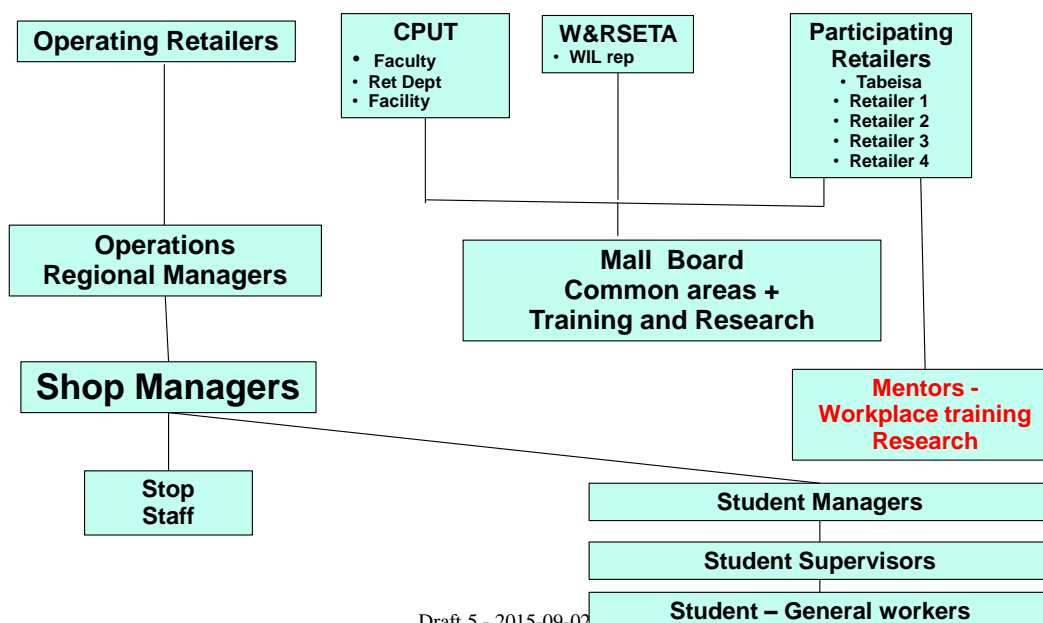
## Management Model 2 – Departmental store



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## Management Model 3 : Mini Mall - Stores



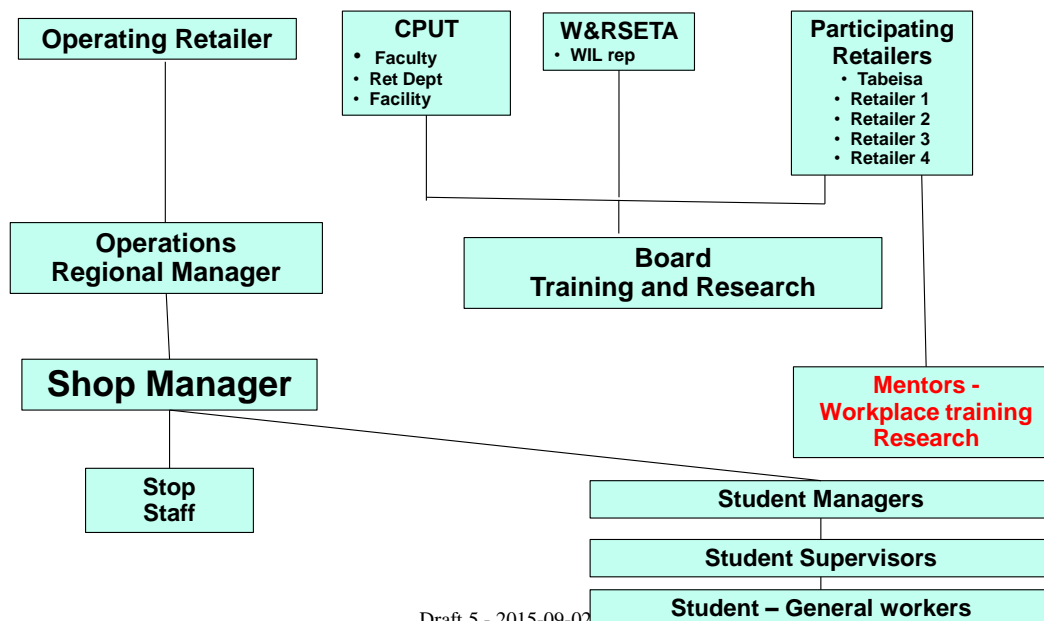
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# Management

## Model 4 : One independent Store



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## Roles and functions

1 – Mini Mall - shelves	2 - Dept Store	3 – Mini Mall - stores	4 – One store
<b>BOARD</b>			
<ul style="list-style-type: none"> <li>Operations:               <ul style="list-style-type: none"> <li>Policy (e.g. Product mix in store)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Operations               <ul style="list-style-type: none"> <li>Policy – e.g. departments</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Operations:               <ul style="list-style-type: none"> <li>Policy (e.g. Product mix in Mall)</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Common areas (e.g. image, safety, security)</li> </ul>	<ul style="list-style-type: none"> <li>Performance of all aspects of the business</li> </ul>	<ul style="list-style-type: none"> <li>Training and Research strategies</li> </ul>	<ul style="list-style-type: none"> <li>Training and Research strategies</li> </ul>
<ul style="list-style-type: none"> <li>Strategic direction</li> </ul>	<ul style="list-style-type: none"> <li>Strategic direction</li> </ul>	<ul style="list-style-type: none"> <li>Strategic direction</li> </ul>	
<b>MENTORS</b>			
<ul style="list-style-type: none"> <li>Provide guidance to the students on all aspects of the business</li> </ul>			
<b>SHOP MANAGER</b>			
<ul style="list-style-type: none"> <li>Operational Management - Certain functions</li> </ul>	<ul style="list-style-type: none"> <li>Operational Management – Certain functions</li> </ul>	<ul style="list-style-type: none"> <li>Operational Management – all functions</li> </ul>	<ul style="list-style-type: none"> <li>Operational Management – all functions</li> </ul>
<ul style="list-style-type: none"> <li>Common areas</li> </ul>	<ul style="list-style-type: none"> <li>Common areas</li> </ul>	<ul style="list-style-type: none"> <li>All areas</li> </ul>	<ul style="list-style-type: none"> <li>All areas</li> </ul>

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# Roles and functions

1 – Mini Mall - shelves	2 - Dept Store	3 + 4 Stores
<b>Student Managers</b>		
• Manage with <b>Retailer the shelves</b> + scheduling of supervisors	• Manage with <b>Retailer the department</b> + scheduling of supervisors	• Manage with <b>Retailer the store</b> + scheduling of supervisors
<b>Student supervisors</b>		
• Supervisory function of <b>shelves</b> (e.g. Scheduling students + stock management)	• Supervisory function of <b>the department</b> (e.g. Scheduling students + stock management)	• Supervisory function in <b>the store</b> (e.g. Scheduling students + stock management)
<b>Student general workers</b>		
• Operational functions of <b>shelves</b> (e.g. replenishment, displays, cleaning)	• Operational functions of <b>the department</b> (e.g. replenishment, displays, cleaning)	• Operational functions in <b>store</b> - replenishment, displays, cleaning)

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## STOCK

### Option 1 – Mini Mall - shelves

1. Product Mix - Own brands + agreed mix by Board
2. Consignment stock
3. Weekly replenishment – no store room facility
4. Supply – closest or nominated store/warehouse
5. Shelves – Retailers provide own
6. One facing per product.
7. Unique number – bar code

### OPTION 3 + 4 : Stores

- Retailer decide with students advice

### OPTION 2 – DEPART STORE

1. **Every retailer allocated a department**
2. **Retailer determine product mix of the department**
3. Consignment stock
4. No store room facility
5. Supply – closest or nominated store/warehouse
6. Shelves – Retailers provide own – **approved by Board to fit in with business image**
7. Unique number – bar code



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# FINANCE

## Option 1 – Mini Mall

1. Retailers provide stock, shelves and display material.
2. Till record all sales and provide daily sales report.
3. TABEISA receive and deposit all cash/payments
4. Monthly payments to Retailers on invoice based on sales report
5. Every retailer is profit centre
6. TABEISA / Retail Shop receive % on sales for operations management ( e.g. 8%, 10% or 12%)
7. No rent
8. Students paid with WIL grant by SETA
9. Profit of Mini Mall – reinvest in Mini Mall



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# FINANCE

## Option 2 – Department Store

1. Retailers provide stock, shelves and display material – **Approved by Board to ensure right image of store**
2. Till record all sales and provide daily sales report.
3. TABEISA receive and deposit all cash/payments
4. Monthly payments to Retailers on invoice based on sales report
5. **Every department** is a profit centre
6. TABEISA / Retail Shop receive a % on sales for operations management ( e.g. 8%, 10% or 12%)
7. No rent
8. Students paid with WIL grant by SETA
9. Profit of **Store** – reinvest **in Store**
10. **Mentors paid by Mentor grant by WRSETA through reta**



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# FINANCE

## Option 3 – Independent Store

1. Retailer provide stock, shelves and display material, layout
2. **Store** is a profit centre
3. Retailers pay a % on sales for Mini Mall Board – **Common areas + research + training**
4. No rent
5. Students paid with WIL grant by SETA
6. **Mentors paid by “Mentor grant” by WRSETA through retailers**



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# FINANCE

## Option 4 – Independent Store

1. Retailer provide stock, shelves and display material, layout
2. **Store** is a profit centre
3. Retailers pay a % on sales for Board **for research - training**
4. No rent
5. Students paid with WIL grant by SETA
6. **Mentors paid by “Mentor grant” by WRSETA through retailers**



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# Summary

OPTION 1 MINI MALL - Shelves	OPTION 2 DEPART STORE	OPTION 3 MINI MALL-STORES	OPTION 4 ONE STORE
Benefits	Benefits	Benefits	Benefits
<ul style="list-style-type: none"> <li>Retailers train own recruits on their own products and systems</li> </ul>	<ul style="list-style-type: none"> <li>Students get training on all aspects of the business and on business as whole</li> </ul>	<ul style="list-style-type: none"> <li>Retail operators – better management and performance</li> </ul>	<ul style="list-style-type: none"> <li>Retail operators – better management and performance</li> </ul>
<ul style="list-style-type: none"> <li>More retailers involved</li> </ul>	<ul style="list-style-type: none"> <li>One standardised logbook</li> </ul>	<ul style="list-style-type: none"> <li>Students get exposure to all aspects of the business and more retailers</li> </ul>	<ul style="list-style-type: none"> <li>Students get exposure to all aspects of the business</li> </ul>
	<ul style="list-style-type: none"> <li>Co-operative environment for participating retailers</li> </ul>	<ul style="list-style-type: none"> <li>Retailers build own Brand and profit centre</li> </ul>	<ul style="list-style-type: none"> <li>Retailer build own Brand and better profit centre</li> </ul>
Risks / Challenges	Risks / Challenges	Risks / Challenges	Risks / Challenges
<ul style="list-style-type: none"> <li>Competitive environment in insignificant small areas</li> </ul>	<ul style="list-style-type: none"> <li>Management of student's workplace experience and completion of logbook</li> </ul>	<ul style="list-style-type: none"> <li>Co-operation between retailers</li> </ul>	<ul style="list-style-type: none"> <li>Support of other retailers in training and research</li> </ul>

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## TRAINING - LOGBOOK

### Option 1 – Mini Mall - shelves

- Logbook customised per retailers needs
- Retailer ensure students completion of workplace experience

### Option 2 – Departmental store

- Board agrees on generic minimum workplace experience in store.
- Student's responsibility for completion of logbook
- Work schedules of to be compiled per department

### Option 3 + 4 Independent stores

- Board agrees on generic minimum workplace experience in store.
- Operator responsible with Retail Dept to work out program of student WIL.
- Operator to give students WIL per agreed program
- Student's responsibility for completion of logbook
- Student can complete logbook at other retailers / branches

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## TRAINING – Logbook Example and format

Year	Functions	Operational	Supervising	Management
1 <sup>st</sup> Years	• <b>Housekeeping</b>	• Cleaning		
	• <b>Finance</b>	• Cashier • Cash-up		
	• <b>Stock</b>	• Packing		
	• <b>Marketing</b>	• Selling		
2 <sup>nd</sup> Years	• <b>Housekeeping</b>		• Check	
	• <b>Finance</b>	• Banking	• Check money	
	• <b>Marketing</b>	• Build displays	• Supervise displays	
	• <b>HR</b>		• Scheduling	
	• <b>Stock</b>	• Displays stock • Collect stock	• Check stock received • Stock take	
3 <sup>rd</sup> Years	• Marketing		• Analyse sales reports	• Marketing plan
	• Stock		• Analyse stock performance	• Plan product mix
	• Finance			• Analyse profitability
	• HR	• Recruit students	• Select students	• Performance man.

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## RESEARCH - EXAMPLES

TYPE OF RESEARCH			2nd yr	3 <sup>rd</sup> yr	4+ yr	Lec	Indus	Other
1	Marketing	• Shopping behaviour	X			X	X	
		• Customer categories		X	X	X	X	
		• Loyalty systems			X	X	X	
2	Stock	• Product specification	X				X	
		• Display techniques		X		X	X	
3	Assets	• Security systems				X	X	X
		• Type of shelves					X	X
4	Systems	• Point of sale			X	X	X	X

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**ANNEXURE F:**  
**Qualifications**  
**Retail Chain Store Manager**

**ANNEXURE F:**  
**Qualifications**

	<b>Curriculum Document</b>			
<b>Curriculum Code</b>	<b>Curriculum Title</b>			
142103001	<b>Retail Chain Store Manager</b>			 Quality Council for Trades & Occupations
	<b>Name</b>	<b>Email</b>	<b>Phone</b>	
<b>Development Quality Partner</b>	<b>Wholesale &amp; Retail SETA</b>	imarrian@wrseta.org.za	012 622 9500	 Skills Development for Economic Growth

\_\_\_\_\_  
**Learner QDF Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**QDF Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**DQP Representative Signature**

\_\_\_\_\_  
**Date**



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## **SECTION 1: CURRICULUM SUMMARY**

### **1. Occupational Information**

#### **1.1 Associated Occupation**

142103: Retail Manager - General

#### **1.2 Occupation or Specialisation Addressed by this Curriculum**

142103001: Retail Chain Store Manager

#### **1.3 Alternative Titles used by Industry**

- Branch manager
- Business unit manager
- Store Manager
- Floor Manager

## **2. Curriculum Information**

### **2.1 Curriculum Structure**

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

Knowledge Modules:

- 142103001-KM-01, Concept and principles of retail operations management, NQF Level 5, Credits 4
- 142103001-KM-02, Concept and principles of communication in retail, NQF Level 4, Credits 4
- 142103001-KM-03, Concepts and principles of leading teams in a retail chain store environment, NQF Level 5, Credits 7
- 142103001-KM-04, Concept and principles of managing service standards of a retail chain store, NQF Level 5, Credits 2
- 142103001-KM-05, Concepts and principles of stock control in a retail chain store, NQF Level 5, Credits 3
- 142103001-KM-06, Concept and principles of implementing promotional activities in a retail chain store, NQF Level 5, Credits 3
- 142103001-KM-07, Concept and principles of improving the financial performance of a retail chain store, NQF Level 5, Credits 3

Total number of credits for Knowledge Modules: 26

Practical Skill Modules:

- 142103001-PM-01, Manage retail chain store employee performance, NQF Level 5, Credits 3
- 142103001-PM-02, Manage retail chain store operational processes, NQF Level 5, Credits 2
- 142103001-PM-03, Manage retail chain store service standards, NQF Level 5, Credits 2
- 142103001-PM-04, Maintain effective retail chain store stakeholder relations, NQF Level 5, Credits 2
- 142103001-PM-05, Manage stock control in a retail chain store, NQF Level 5, Credits 3
- 142103001-PM-06, Propose improvements to a retail chain store's range and layout, NQF Level 5, Credits 2
- 142103001-PM-07, Implement plans to improve sales in a retail chain store, NQF Level 5, Credits 2
- 142103001-PM-08, Implement plans to improve a retail chain store's financial performance, NQF Level 5, Credits 2
- 142103001-PM-09, Manage risk and maintain assets in a retail chain store, NQF Level 5, Credits 3

Total number of credits for Practical Skill Modules: 21

This qualification also requires the following Work Experience Modules:

- 142103001-WM-01, Processes and procedures for planning and implementing retail chain store operations, NQF Level 5, Credits 9
- 142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment, NQF Level 4, Credits 8
- 142103001-WM-03, Processes and procedures for managing retail chain store service standards, NQF Level 5, Credits 8
- 142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations, NQF Level 5, Credits 4
- 142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout, NQF Level 5, Credits 8
- 142103001-WM-06, Processes and procedures for improving the retail chain store's bottom line, NQF Level 5, Credits 8

- 142103001-WM-07, Processes and procedures for managing sales and promotional activities, NQF Level 5, Credits 6
- 142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store, NQF Level 5, Credits 8

Total number of credits for Work Experience Modules: 59

## **2.2 Entry Requirements**

National Senior Certificate (NSC) or National Vocational Certificate (NCV) at NQF level 4

## **3. Assessment Quality Partner Information**

Name of body: Wholesale & Retail SETA

Address of body: South Riverside Office Park Cnr Heuwel and Lenchen Roads Centurion 0157

Contact person name: Inger Marrian

Contact person work telephone number: 012 622 9500

## **4. Part Qualification Curriculum Structure**

## **SECTION 2: OCCUPATIONAL PROFILE**

### **1. Occupational Purpose**

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

### **2. Occupational Tasks**

- Lead teams to achieve retail chain store operational objectives (NQF Level 5)
- Manage service standards of a retail chain store (NQF Level 5)
- Manage stock control in a retail chain store (NQF Level 5)
- Improve the financial performance of a retail chain store (NQF Level 5)

### **3. Occupational Task Details**

#### **3.1. 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

#### **3.2. 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

#### **3.3. 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

**3.4. 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

**SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS****SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS**

List of Knowledge Modules for which Specifications are included

- 142103001-KM-01, Concept and principles of retail operations management, NQF Level 5, Credits 4
- 142103001-KM-02, Concept and principles of communication in retail, NQF Level 4, Credits 4
- 142103001-KM-03, Concepts and principles of leading teams in a retail chain store environment, NQF Level 5, Credits 7
- 142103001-KM-04, Concept and principles of managing service standards of a retail chain store, NQF Level 5, Credits 2
- 142103001-KM-05, Concepts and principles of stock control in a retail chain store, NQF Level 5, Credits 3
- 142103001-KM-06, Concept and principles of implementing promotional activities in a retail chain store, NQF Level 5, Credits 3
- 142103001-KM-07, Concept and principles of improving the financial performance of a retail chain store, NQF Level 5, Credits 3



## **1. 142103001-KM-01, Concept and principles of retail operations management, NQF Level 5, Credits 4**

### **1.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles for managing the operations of a retail chain store.

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 5 days

The learning will enable learners to demonstrate an understanding of:

- KM-01-KT01: Principles of retailing (30%)
- KM-01-KT02: Principles of building stakeholder relations (10%)
- KM-01-KT03: Concepts and principles of retail chain store operations management (40%)
- KM-01-KT04: Concepts and principles of staff scheduling (20%)

### **1.2 Guidelines for Topics**

#### **1.2.1. KM-01-KT01: Principles of retailing (30%)**

***Topic elements to be covered include:***

- KT0101 Nature of retailing locally and internationally
- KT0102 Characteristics of the current retail environment, including shopping patterns, working hours, staffing issues
- KT0103 Categories and sectors of retailing in South Africa and their role in the community
- KT0104 The relationship and inter dependence between the outlet and store support functions and the organisation
- KT0105 The relationship and inter-dependence between the various departments within a retail outlet
- KT0106 The concept and principles of “Green” retailing and how it is impacting on the industry

***Internal Assessment Criteria and Weight***

- IAC0101 Describe the nature of retailing locally and internationally
- IAC0102 Describe and discuss the characteristics of the current retail environment, including shopping patterns, working hours, staffing issues
- IAC0103 Describe the categories and sectors of retailing in South Africa with examples and discuss their role in the community

- IAC0104 Describe and explain the relationship and inter-dependence between the outlet and store support functions
- IAC0105 Describe and explain the relationship and inter-dependence between the various departments within a retail outlet
- IAC0106 Describe the concept and principles of “Green” retailing and explain how it is impacting on the industry

**(Weight 30%)**

### **1.2.2. KM-01-KT02: Principles of building stakeholder relations (10%)**

***Topic elements to be covered include:***

- KT0201 The concept of stakeholders and the relevant stakeholders of a retail chain organisation
- KT0202 The stakeholders relevant to the retail chain store
- KT0203 The retail chain store manager’s involvement in building stakeholder relations
- KT0204 Legislation impacting on stakeholders

***Internal Assessment Criteria and Weight***

- IAC0201 Define the concept of stakeholders and discuss the stakeholders relevant to a retail chain organisation
- IAC0202 Discuss the stakeholders relevant to the retail chain store
- IAC0203 Discuss the retail chain store manager’s involvement in building stakeholder relations with examples
- IAC0204 Discuss the different legislation and it’s purpose that impact on the different stakeholders of the industry

**(Weight 10%)**

### **1.2.3. KM-01-KT03: Concepts and principles of retail chain store operations management (40%)**

***Topic elements to be covered include:***

- KT0301 Concepts and principles of retail chain store operations management
- KT0302 Capacity and resource planning and control
- KT0303 Methods and tools used in retail chain store operations management
- KT0304 Elements of daily, weekly and monthly operational activities in the retail chain store

***Internal Assessment Criteria and Weight***

- IAC0301 Describe and explain the key concepts and principles of operations management in a retail chain store
- IAC0302 Explain the principles and processes involved in capacity and resources planning and control
- IAC0303 Describe methods and tools used in retail chain store operations management and their application
- IAC0304 Describe and explain the key elements to be included in the management of daily, weekly and monthly operational activities in a retail chain store

**(Weight 40%)**

#### **1.2.4. KM-01-KT04: Concepts and principles of staff scheduling (20%)**

***Topic elements to be covered include:***

- KT0401 Categories of staff in retailing, their legal hours of work and costs to the company
- KT0402 Concepts and principles of staff scheduling and tools used to manage scheduling
- KT0403 Concepts and principles of recruitment in a retail chain store environment
- KT0404 Concept and principles of induction of new staff in a retail chain store environment

***Internal Assessment Criteria and Weight***

- IAC0401 Describe and explain the categories of staff in retail, their legal hours of work and their cost to the business
- IAC0402 Describe the concept and principles of staff scheduling and explain generally accepted tools used to manage scheduling
- IAC0403 Describe the concept and principles of recruitment in a retail chain store environment
- IAC0404 Describe and explain the concept and principles of induction of new staff in a retail chain store environment

**(Weight 20%)**

### **1.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of induction checklists

***Human Resource Requirements:***

- Lecturers must have relevant industry experience related to the subject.

- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

## **1.4 Exemptions**

- None

## **2. 142103001-KM-02, Concept and principles of communication in retail, NQF Level 4, Credits 4**

### **2.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles for communicating verbally and in writing, in a professional manner in a retail chain store environment.

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 5 days

The learning will enable learners to demonstrate an understanding of:

- KM-02-KT01: Communication theory (25%)
- KM-02-KT02: Concepts and principles of business correspondence (30%)
- KM-02-KT03: Concepts and principles of holding meetings in a retail store (15%)
- KM-02-KT04: Concepts and principles of interpersonal communication (30%)

### **2.2 Guidelines for Topics**

#### **2.2.1. KM-02-KT01: Communication theory (25%)**

***Topic elements to be covered include:***

- KT0101 Definitions of communication
- KT0102 The communication process
- KT0103 Verbal and nonverbal communication
- KT0104 Types of communication
- KT0105 Barriers to communication

- KT0106 Organisational lines of communication
- KT0107 Management of internal and external communication in the retail chain store environment
- KT0108 Principles of plain language and jargon
- KT0109 Implications and consequences of poor communication

***Internal Assessment Criteria and Weight***

- IAC0101 Define, and describe communication and the communication process
- IAC0102 Describe and explain the nature of verbal and non-verbal communication
- IAC0103 Describe various types of communication and the purpose of each type
- IAC0104 Describe and discuss various barriers to communication and methods of overcoming them
- IAC0105 Describe and explain lines of communication in a retail chain store organisation
- IAC0106 Describe and discuss internal and external communication in the retail chain store environment, and its management
- IAC0107 Describe the characteristics and benefits of using plain language and when jargon should be used
- IAC0108 Describe the consequences and impact of poor communication

***(Weight 25%)***

**2.2.2. KM-02-KT02: Concepts and principles of business correspondence (30%)**

***Topic elements to be covered include:***

- KT0201 Principles of sound business correspondence
- KT0202 Principles and management of e-mail communication
- KT0203 Implications and consequences of poor business correspondence and report writing
- KT0204 Principles of report writing

***Internal Assessment Criteria and Weight***

- IAC0201 Describe the principles of sound business correspondence
- IAC0202 Describe and explain the format, advantages and limitations of e-mail communication
- IAC0203 Describe the principles of managing e mails
- IAC0204 Describe the consequences and impact of poor business correspondence and report writing
- IAC0205 Describe the principles of report writing

***(Weight 30%)***

### **2.2.3. KM-02-KT03: Concepts and principles of holding meetings in a retail store (15%)**

***Topic elements to be covered include:***

- KT0301 Structure of various types of meetings
- KT0302 Principles of meeting planning, agendas and preparing notices
- KT0303 Principles of minute taking and writing
- KT0304 Principles of managing meetings
- KT0305 Implications and consequences of poor meeting management

***Internal Assessment Criteria and Weight***

- IAC0301 Describe the structure of various types of meetings
- IAC0302 Describe the procedures to be followed when conducting a meeting
- IAC0303 Describe and explain the nature and layout of agendas and notices of meetings
- IAC0304 Describe and explain the nature and layout of minute taking and writing
- IAC0305 Describe the nature of managing meetings using examples of including quiet people, handling disruptive people and the handling of arguments
- IAC0306 Describe the consequences and impact of poor meeting management

***(Weight 15%)***

### **2.2.4. KM-02-KT04: Concepts and principles of interpersonal communication (30%)**

***Topic elements to be covered include:***

- KT0401 Concepts and principles of effective verbal communication to staff
- KT0402 Concepts and principles of effective verbal communication to customers
- KT0403 Concepts and principles of effective verbal communication to senior management
- KT0404 Principles of effective listening

***Internal Assessment Criteria and Weight***

- IAC0401 Discuss the concept and principles of effective verbal communication to staff
- IAC0402 Discuss the concept and principles of effective verbal communication to customers
- IAC0403 Discuss the concepts and principles of effective verbal communication to senior management
- IAC0404 Discuss the principles of effective listening

***(Weight 30%)***

## 2.3 Provider Programme Accreditation Criteria

### *Physical Requirements:*

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of e mail communication, Examples of written reports, Examples of operational meeting agendas, Examples of operational meeting minutes

### *Human Resource Requirements:*

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

### *Legal Requirements:*

- A legal business entity
- Meet health and safety standards

## 2.4 Exemptions

- None

## **3. 142103001-KM-03, Concepts and principles of leading teams in a retail chain store environment, NQF Level 5, Credits 7**

### **3.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles of management and leadership

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 9 days

The learning will enable learners to demonstrate an understanding of:

- KM-03-KT01: The principles of management in a retail business (20%)
- KM-03-KT02: Concept and principles of leadership (20%)
- KM-03-KT03: Concepts and principles of self-management (10%)
- KM-03-KT04: Principles of industrial relations (15%)
- KM-03-KT05: Labour related legislation (15%)
- KM-03-KT06: Concepts and principles of diversity management (10%)

- KM-03-KT07: Human Resources administration and management standards (10%)

### **3.2 Guidelines for Topics**

#### **3.2.1. KM-03-KT01: The principles of management in a retail business (20%)**

##### ***Topic elements to be covered include:***

- KT0101 The nature of management in a retail environment
- KT0102 The nature and components of planning in a retail chain store
- KT0103 The concept of organising in a retail chain store
- KT0104 The nature and elements of leading in a retail chain store
- KT0105 The nature of controlling in a retail chain store
- KT0106 The nature of the decision-making process in a retail chain store

##### ***Internal Assessment Criteria and Weight***

- IAC0101 Describe and explain the nature and role of management in a retail chain store
- IAC0102 Describe and explain the nature and components of planning in a retail chain store
- IAC0103 Explain and discuss the concept of organising in a retail chain store
- IAC0104 Describe and discuss the nature and elements of leading in a retail chain store
- IAC0105 Describe and discuss the nature of controlling in a retail chain store
- IAC0106 Describe and explain the nature of the decision-making process in a retail chain store

***(Weight 20%)***

#### **3.2.2. KM-03-KT02: Concept and principles of leadership (20%)**

##### ***Topic elements to be covered include:***

- KT0201 The concepts, principles, function of leadership and role and function of a team leader
- KT0202 The difference between management and leadership
- KT0203 The concept and principles of motivation
- KT0204 Group behaviour in the organisation
- KT0205 The fundamentals of leadership and leadership styles

##### ***Internal Assessment Criteria and Weight***

- IAC0201 Describe and discuss the concepts, principles, function of leadership and role and function of a team leader
- IAC0202 Differentiate between management and leadership



- IAC0203 Explain and discuss the concept of motivation in a retail environment
- IAC0204 Describe and discuss the nature of group behaviour and explain its relevance in a retail chain store
- IAC0205 Describe and discuss various leadership styles and their applications in different situations

**(Weight 20%)**

### **3.2.3. KM-03-KT03: Concepts and principles of self-management (10%)**

***Topic elements to be covered include:***

- KT0301 Principles of self-analysis and gap identification
- KT0302 Factors impacting on self-image and development gaps
- KT0303 The concept of a personal development plan
- KT0304 The concept of self-discipline and of positive reframing
- KT0305 The concept of self-motivation
- KT0306 The impact and consequences of procrastination in self development

***Internal Assessment Criteria and Weight***

- IAC0301 Describe and discuss the principles of self-analysis and gap identification
- IAC0302 Describe and discuss factors impacting on self-image and development gaps
- IAC0303 Describe and explain the process of personal development planning
- IAC0304 Describe and explain the concept self-discipline and positive reframing
- IAC0305 Describe and explain the concept of self-motivation
- IAC0306 Describe the impact and consequences of procrastination in self-development

**(Weight 10%)**

### **3.2.4. KM-03-KT04: Principles of industrial relations (15%)**

***Topic elements to be covered include:***

- KT0401 Role players and their roles in the industrial relations landscape of retail in South Africa
- KT0402 Concepts, principles and generally accepted processes of discipline and grievances handling in a retail chain environment and the consequences of not following legal and organisational procedures
- KT0403 The generally accepted dismissals process in a retail chain environment
- KT0404 The nature and purpose of recognition agreements

***Internal Assessment Criteria and Weight***

- IAC0401 Discuss the role players and their roles in the industrial relations landscape of retail in South Africa
- IAC0402 Describe the concepts, principles and generally accepted processes of discipline and grievances handling in a retail chain environment and explain the consequences of not following legal and organisational procedures
- IAC0403 Describe the generally accepted dismissals process in a retail chain environment
- IAC0404 Discuss the nature and purpose of recognition agreements

**(Weight 15%)**

### **3.2.5. KM-03-KT05: Labour related legislation (15%)**

***Topic elements to be covered include:***

- KT0501 The Labour Relations Act and its impact on team leadership in a retail chain store
- KT0502 The Basic Conditions of Employment Act and its impact on team leadership in a retail chain store
- KT0503 The Employment Equity Act and its impact on team leadership in a retail chain store
- KT0504 The Sectoral Determination in retail and its impact on team leadership in a retail chain store
- KT0505 Skills development legislation and its impact on team leadership in a retail chain store
- KT0506 The wage determination Act and its impact on team leadership in a retail chain store

***Internal Assessment Criteria and Weight***

- IAC0501 Describe the impact of the Labour Relations Act on team leadership in a retail chain store
- IAC0502 Describe the impact of the Basic Conditions of Employment Act on team leadership in a retail chain store
- IAC0503 Describe the impact of the Employment Equity Act on team leadership in a retail chain store
- IAC0504 Describe the impact of the Sectoral Determination on team leadership in a retail chain store
- IAC0505 Describe the impact of skills development legislation on team leadership in a retail chain store

- IAC0506 Describe the impact of the Wage Determination Act on team leadership in a retail chain store

**(Weight 15%)**

### **3.2.6. KM-03-KT06: Concepts and principles of diversity management (10%)**

***Topic elements to be covered include:***

- KT0601 The different forms of diversity including race, gender, age, class and disability
- KT0602 Concepts and principles of diversity management
- KT0603 Typical stereotyping of the different groups
- KT0604 Characteristics of an environment that is conducive for cultural diversity
- KT0605 Principles of dealing with cultural conflict situations

***Internal Assessment Criteria and Weight***

- IAC0601 Discuss, with examples the different forms of diversity
- IAC0602 Describe the concepts and principles of diversity management
- IAC0603 Discuss with examples typical stereotyping of the different groups
- IAC0604 Describe the characteristics of an environment that is conducive for cultural diversity
- IAC0605 Discuss the principles of dealing with cultural conflict situations with examples

**(Weight 10%)**

### **3.2.7. KM-03-KT07: Human Resources administration and management standards (10%)**

***Topic elements to be covered include:***

- KT0701 The management standards used in Human Resource management
- KT0702 The cost of staff turnover and absenteeism to the store
- KT0703 The role of the chain store manager and Store Support Centre in Human Resource management
- KT0704 The role of the chain store manager and Store Support Centre in recruitment, selection and placement
- KT0705 The role of the chain store manager and Store Support Centre in training and development
- KT0706 The role of the chain store manager and Store Support Centre in administrative requirements relating to staffing

***Internal Assessment Criteria and Weight***

- IAC0701 Describe the management standards used in Human Resource management
- IAC0702 Explain the costs to the store of staff absenteeism and staff turnover
- IAC0703 Describe with examples the role of the chain store manager and Store Support Centre in Human Resource management
- IAC0704 Describe with examples the role of the chain store manager and Store Support Centre in recruitment, selection and placement
- IAC0705 Describe with examples the role of the chain store manager and Store Support Centre in training and development
- IAC0706 Describe with examples the role of the chain store manager and Store Support Centre in administrative requirements relating to staffing

**(Weight 10%)**

### **3.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of a personal development plan

#### *Human Resource Requirements:*

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

#### *Legal Requirements:*

- A legal business entity
- Meet health and safety standards

### **3.4 Exemptions**

- None

#### **4. 142103001-KM-04, Concept and principles of managing service standards of a retail chain store, NQF Level 5, Credits 2**

##### **4.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of customer service, including service standards, health, safety and housekeeping and their impact on customer service

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learning will enable learners to demonstrate an understanding of:

- KM-04-KT01: Principles of customer service and service standards (60%)
- KM-04-KT02: Health, safety and housekeeping (40%)

##### **4.2 Guidelines for Topics**

##### **4.2.1. KM-04-KT01: Principles of customer service and service standards (60%)**

***Topic elements to be covered include:***

- KT0101 The function and purpose of customer service
- KT0102 Customer service as a competitive strategy
- KT0103 Customer service principles and standards in a retail store
- KT0104 Areas of customer service in a retail store
- KT0105 The concept of “Moments of Truth” and principles of managing “Moments of Truth”
- KT0106 The concept of quality and the impact of quality on the customer’s perceptions of service
- KT0107 Legislation impacting on customer service in retail
- KT0108 Concepts and principles of dealing with dissatisfied customers and the impact on the store of not doing so correctly

***Internal Assessment Criteria and Weight***

- IAC0101 Explain the function and purpose of customer service
- IAC0102 Describe the relationship between customer satisfaction and business competitiveness
- IAC0103 Describe and explain customer service principles and standards in a retail store
- IAC0104 Describe all areas of customer service in a retail chain store

- IAC0105 Describe with examples the concept of “Moments of Truth” and the principles of managing “Moments of Truth”
- IAC0106 Discuss the concept of quality and the impact of quality on the customer’s perceptions of service
- IAC0107 Interpret and explain relevant legislation impacting on customer service in retail
- IAC0108 Describe the concepts and principles of dealing with dissatisfied customers and discuss the impact on the store of not doing so correctly

**(Weight 60%)**

#### **4.2.2. KM-04-KT02: Health, safety and housekeeping (40%)**

***Topic elements to be covered include:***

- KT0201 The concepts of health and safety in a retail business
- KT0202 Health and safety and housekeeping legislation impacting on a retail store and the importance of compliance
- KT0203 Principles and generally accepted standards of cleanliness and neatness of a retail store
- KT0204 Principles and generally accepted standards of Health and Safety in a retail store

***Internal Assessment Criteria and Weight***

- IAC0201 Define and explain health and safety in a retail business
- IAC0202 Interpret and explain relevant Health and Safety and housekeeping legislation and how it applies to a retail chain store and explain the consequences of not adhering to legislation
- IAC0203 Describe and explain concepts, principles and generally accepted standards of cleanliness and neatness of a retail business
- IAC0204 Describe and explain concepts, principles and generally accepted standards of health and safety in a retail business

**(Weight 40%)**

#### **4.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids,

***Human Resource Requirements:***

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners

- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

#### **4.4 Exemptions**

- None

## **5. 142103001-KM-05, Concepts and principles of stock control in a retail chain store, NQF Level 5, Credits 3**

### **5.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles for managing stock in a retail chain store

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learning will enable learners to demonstrate an understanding of:

- KM-05-KT01: Concepts and principles of logistics and the supply chain (20%)
- KM-05-KT02: Principles of controlling stocks (30%)
- KM-05-KT03: Concepts and principles of buying and replenishment in a chain store organisation (20%)
- KM-05-KT04: Concepts and principles of product mix and range (30%)

### **5.2 Guidelines for Topics**

#### **5.2.1. KM-05-KT01: Concepts and principles of logistics and the supply chain (20%)**

***Topic elements to be covered include:***

- KT0101 The product flow from source to customer
- KT0102 Generally accepted measures of stock performance including stock turns, days cover, weeks supply
- KT0103 The impact of logistics and the supply chain on stock availability
- KT0104 Generally accepted methods of retail chain store managers influencing the supply chain in order to improve stock availability in the store

***Internal Assessment Criteria and Weight***

- IAC0101 Describe and explain the flow of products from supplier to customer in the retail environment
- IAC0102 Describe and explain the concepts of stock turns, days cover, weeks supply
- IAC0103 Describe and explain the impact of logistics and the supply chain on stock availability
- IAC0104 Discuss with examples how a retail chain store managers can influence the supply chain in order to improve stock availability in the store

***(Weight 20%)***



### **5.2.2. KM-05-KT02: Principles of controlling stocks (30%)**

***Topic elements to be covered include:***

- KT0201 The impact of stock management on minimising overstocks and sold outs
- KT0202 Concepts and principles of managing stock levels in the retail chain store environment
- KT0203 Concepts and principles of managing stock counts
- KT0204 Principles of managing in-store ordering and the receiving and dispatch processes
- KT0205 Principles of managing stock in a stockroom
- KT0206 Principles of managing stock in the sales area
- KT0207 Concepts and principles of managing under, over and dead stock situations

***Internal Assessment Criteria and Weight***

- IAC0201 Describe the impact of stock management on minimising overstocks and sold outs
- IAC0202 Describe and explain the concepts and principles of managing stock levels in the retail chain store environment
- IAC0203 Describe and explain the concepts and principles of managing stock counts
- IAC0204 Describe and explain the principles of managing in-store ordering and the receiving processes
- IAC0205 Describe and explain the principles of managing stock in a stockroom
- IAC0206 Describe and explain the principles of managing stock in the sales area
- IAC0207 Describe and explain the concepts and principles of managing under, over and dead stock situations

***(Weight 30%)***

### **5.2.3. KM-05-KT03: Concepts and principles of buying and replenishment in a chain store organisation (20%)**

***Topic elements to be covered include:***

- KT0301 The concepts and principles of ordering and replenishment and different models used in a retail chain store organisations
- KT0302 Advantages and disadvantages of different ordering and replenishment models
- KT0303 The role of the Buyer and Planner in a retail chain store organisation
- KT0304 Generally accepted methods of retail chain store managers influencing the buying and replenishment process in order to improve stock turns in the store

***Internal Assessment Criteria and Weight***

- IAC0301 Discuss the concepts and principles of ordering and replenishment and different models used by retail chain stores along with their advantages and disadvantages
- IAC0302 Describe the role of the Buyer and Planner in a retail chain store organisation
- IAC0303 Discuss with examples how a retail chain store managers can influencing the buying and replenishment process in order to improve stock turns in the store

**(Weight 20%)**

#### **5.2.4. KM-05-KT04: Concepts and principles of product mix and range (30%)**

***Topic elements to be covered include:***

- KT0401 The concept of product mix and its influence on the bottom line of the store
- KT0402 The principles of category management
- KT0403 The impact of the Brand's image and store target market on mix and range allocation
- KT0404 Generally accepted methods for retail chain store managers to influence product mix and range for the store

***Internal Assessment Criteria and Weight***

- IAC0401 Describe the concept of product mix and explain its influence on the bottom line of the store
- IAC0402 Describe and explain the key principles of category management
- IAC0403 Discuss the impact of the Brand's image and store target market on mix and range allocation and the disadvantages of all stores in the chain having to sell the same
- IAC0404 Discuss with examples how a retail chain store managers can influencing the product mix and range for the store

**(Weight 30%)**

### **5.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of the supply chains, Examples of stock management reports

***Human Resource Requirements:***

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners

- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

#### **5.4 Exemptions**

- None

### **6. 142103001-KM-06, Concept and principles of implementing promotional activities in a retail chain store, NQF Level 5, Credits 3**

#### **6.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles for implementing Store Support Centre planned promotional activities Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learning will enable learners to demonstrate an understanding of:

- KM-06-KT01: Advertising and promotions principles and strategies (15%)
- KM-06-KT02: Principles of visual merchandising (20%)
- KM-06-KT03: Ticketing principles (50%)
- KM-06-KT04: Head Office control of promotional displays (15%)

#### **6.2 Guidelines for Topics**

##### **6.2.1. KM-06-KT01: Advertising and promotions principles and strategies (15%)**

***Topic elements to be covered include:***

- KT0101 The concept of marketing in the retail environment
- KT0102 Typical advertising principles and strategies used to attract customers to a retail chain store
- KT0103 Types of retail advertising, promotional methods and media
- KT0104 The principles of sales and sales management in a retail business
- KT0105 Types of sales promotions used in a retail business
- KT0106 The principles of display and its affect on sales
- KT0107 The principles of promotional ticketing and its effect on sales

**Internal Assessment Criteria and Weight**

- IAC0101 Describe and explain, with examples, the concept of marketing in the retail environment
- IAC0102 Describe and explain typical advertising principles and strategies used to attract customers to a retail chain store
- IAC0103 Describe and discuss types of retail advertising, promotional methods and media
- IAC0104 Describe the principles of sales and sales management in a retail business
- IAC0105 Discuss the types of sales promotions used in a retail business
- IAC0106 Describe the principles of display and describe its affect on sales
- IAC0107 Describe the principals of point of sale ticketing and their effect on sales

**(Weight 15%)**

**6.2.2. KM-06-KT02: Principles of visual merchandising (20%)****Topic elements to be covered include:**

- KT0201 Concepts and purpose of visual merchandising
- KT0202 The potential impact of visual merchandising on sales
- KT0203 Basic principles of visual merchandising

**Internal Assessment Criteria and Weight**

- IAC0201 Define visual merchandising and explain and describe its key concepts and purpose
- IAC0202 Discuss the potential impact that visual merchandising could have on sales in a retail chain store
- IAC0203 Describe and explain with examples the basic principles of visual merchandising

**(Weight 20%)**

**6.2.3. KM-06-KT03: Ticketing principles (50%)****Topic elements to be covered include:**

- KT0301 Types of ticketing and its uses including wash lines, hanging banners, shelf tickets, wobblers etc
- KT0302 Generally accepted methods for displaying ticketing
- KT0303 Concepts and principles of detailing information on ticketing

**Internal Assessment Criteria and Weight**

- IAC0301 Identify types of ticketing and describe their uses
- IAC0302 Describe and explain generally accepted methods for displaying ticketing

- IAC0303 Discuss the impact on the store of the information detailed on ticketing  
(Weight 50%)

#### **6.2.4. KM-06-KT04: Head Office control of promotional displays (15%)**

##### ***Topic elements to be covered include:***

- KT0401 The concepts and principles of centralised and decentralised Head Office control over promotional displays
- KT0402 The conflict between set layouts and promotional displays
- KT0403 Generally accepted principles of implementing promotional activity within centralised Head Office control
- KT0404 Generally accepted principles of implementing promotional activity within decentralised Head Office control

##### ***Internal Assessment Criteria and Weight***

- IAC0401 Describe and explain the concepts and principles of centralised and decentralised Store Support Centre control over promotional displays
- IAC0402 Discuss the conflict between set layouts and promotional displays
- IAC0403 Describe generally accepted principals of implementing promotional activity within centralised Store Support Centre control
- IAC0404 Describe generally accepted principals of implementing promotional activity within decentralised Store Support Centre control

**(Weight 15%)**

### **6.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of various retail adverts, Examples of different retail promotional methods, Examples of retail promotional displays, Examples of promotional ticketing, Examples of visual merchandising displays

#### ***Human Resource Requirements:***

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

#### ***Legal Requirements:***

- A legal business entity
- Meet health and safety standards

#### **6.4 Exemptions**

- None

## **7. 142103001-KM-07, Concept and principles of improving the financial performance of a retail chain store, NQF Level 5, Credits 3**

### **7.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the concepts and principles for improving the bottom line contribution of a retail chain store to the organisation

Learning contact time - the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learning will enable learners to demonstrate an understanding of:

- KM-07-KT01: Financial reports used by retail chain stores (15%)
- KM-07-KT02: Principles of chain store financial report analyses (15%)
- KM-07-KT03: Concept and principles of shrinkage and loss control (15%)
- KM-07-KT04: Concept and principles of risk management (15%)
- KM-07-KT05: Concept and principles of asset control and maintenance (10%)
- KM-07-KT06: Principles for improving the store's bottom line (30%)

### **7.2 Guidelines for Topics**

#### **7.2.1. KM-07-KT01: Financial reports used by retail chain stores (15%)**

***Topic elements to be covered include:***

- KT0101 The goals of financial management in a retail chain store
- KT0102 The concept and principle of budgets
- KT0103 Generally accepted methods for budgeting for a retail chain store
- KT0104 The various financial reports used in a retail chain store on a daily, weekly, monthly, quarterly and annual basis

***Internal Assessment Criteria and Weight***

- IAC0101 Describe the goals of financial management of a retail chain store manager
- IAC0102 Describe and explain the concept and principles of budgets
- IAC0103 Discuss generally accepted methods for budgeting for a retail chain store
- IAC0104 Describe and explain the various financial reports used in a retail chain store on a daily, weekly, monthly, quarterly and annual basis

***(Weight 15%)***

### **7.2.2. KM-07-KT02: Principles of chain store financial report analyses (15%)**

***Topic elements to be covered include:***

- KT0201 Basic retail chain store financial performance measures and ratios
- KT0202 Concepts and principles for calculating the bottom line contribution of a retail chain store
- KT0203 The various types of costs related to retail business operations
- KT0204 The concept of fixed and variable cost in a retail business
- KT0205 The expenses controllable at retail chain store level

***Internal Assessment Criteria and Weight***

- IAC0201 Identify and explain the various financial performance measures and ratios used in retail chain stores
- IAC0202 Identify the major components on a retail chain store income statement and describe their impact on the bottom line of the store
- IAC0203 Differentiate between fixed and variable costs of a retail chain store
- IAC0204 Identify and describe the expenses controllable at retail chain store level

***(Weight 15%)***

### **7.2.3. KM-07-KT03: Concept and principles of shrinkage and loss control (15%)**

***Topic elements to be covered include:***

- KT0301 Definition, calculation and impact of shrinkage on a retail business
- KT0302 Concept and definition of risk and the difference between risk and shrinkage
- KT0303 Types of internal shrinkage in a retail business including staff theft, waste and damages
- KT0304 Types of external shrinkage in a retail business including shoplifting and theft by service agents
- KT0305 Detecting and preventing internal shrinkage
- KT0306 Detecting and preventing external shrinkage
- KT0307 Legal requirements in respect of apprehending suspected shoplifters

***Internal Assessment Criteria and Weight***

- IAC0301 Define and describe the concepts and difference between shrinkage and risk
- IAC0302 Define and describe the impact of shrinkage on a retail business
- IAC0303 Discuss and describe the various types of shrinkage in a retail business
- IAC0304 Discuss methods for preventing losses other than theft
- IAC0305 Describe methods of detecting and preventing shoplifting



- IAC0306 Describe methods of reducing employee theft
- IAC0307 Describe the legal requirements in the apprehension of a suspected shoplifter

**(Weight 15%)**

#### **7.2.4. KM-07-KT04: Concept and principles of risk management (15%)**

***Topic elements to be covered include:***

- KT0401 Concepts and principles of risk management planning
- KT0402 Generally accepted areas of risk in a retail store
- KT0403 Risk assessment in a retail chain store
- KT0404 Risk control strategies

***Internal Assessment Criteria and Weight***

- IAC0401 Identify and discuss the concepts and principles of risk management planning
- IAC0402 Identify the areas of risks in a retail chain store
- IAC0403 Describe risk assessment processes applicable to a retail chain store
- IAC0404 Describe risk control strategies applicable to a retail chain store

**(Weight 15%)**

#### **7.2.5. KM-07-KT05: Concept and principles of asset control and maintenance (10%)**

***Topic elements to be covered include:***

- KT0501 Definition and types of retail store assets
- KT0502 Purpose and principles of asset control
- KT0503 The impact of asset maintenance on the bottom line

***Internal Assessment Criteria and Weight***

- IAC0501 Define and describe the concept of assets in a retail store
- IAC0502 Explain the purpose and key principles of asset control
- IAC0503 Explain the impact of asset maintenance on the bottom line
- IAC0504 Identify the controls of assets required by chain store managers

**(Weight 10%)**

#### **7.2.6. KM-07-KT06: Principles for improving the store's bottom line (30%)**

***Topic elements to be covered include:***

- KT0601 Concepts and principles of comparing store performance to budgets and or forecasts to evaluate store performance

- KT0602 Concept and principles of comparing present to past store financial performance
- KT0603 Generally accepted methods for improving store financial performance

***Internal Assessment Criteria and Weight***

- IAC0601 Describe the use of budgets in the analyses of store financial performance
- IAC0602 Describe the use of present and past performance in the analyses of store financial performance
- IAC0603 Describe 3 methods for improving the performance of 4 expenses controllable at store level

***(Weight 30%)***

**7.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Training materials, Learner Guide, Facilitator Guide, Hand outs, Visual Aids, Examples of financial reports used at retail chain store level, Examples of retail chain store asset register,

*Human Resource Requirements:*

- Lecturers must have relevant industry experience related to the subject.
- Ratio of 1 facilitator to maximum of 30 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as a retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

**7.4 Exemptions**

- None

**SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS**

## List of Practical Skill Module Specifications

- 142103001-PM-01, Manage retail chain store employee performance, NQF Level 5, Credits 3
- 142103001-PM-02, Manage retail chain store operational processes, NQF Level 5, Credits 2
- 142103001-PM-03, Manage retail chain store service standards, NQF Level 5, Credits 2
- 142103001-PM-04, Maintain effective retail chain store stakeholder relations, NQF Level 5, Credits 2
- 142103001-PM-05, Manage stock control in a retail chain store, NQF Level 5, Credits 3
- 142103001-PM-06, Propose improvements to a retail chain store's range and layout, NQF Level 5, Credits 2
- 142103001-PM-07, Implement plans to improve sales in a retail chain store, NQF Level 5, Credits 2
- 142103001-PM-08, Implement plans to improve a retail chain store's financial performance, NQF Level 5, Credits 2
- 142103001-PM-09, Manage risk and maintain assets in a retail chain store, NQF Level 5, Credits 3

## **1. 142103001-PM-01, Manage retail chain store employee performance, NQF Level 5, Credits 3**

### **1.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice communicating for a variety of purposes in a variety of situations in a retail business, and to manage employee performance

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learner will be required to:

- PM-01-PS01: Communicate in a retail environment
- PM-01-PS02: Manage meeting processes
- PM-01-PS03: Manage people dynamics
- PM-01-PS04: Evaluate employee performance

### **1.2 Guidelines for Practical Skills**

#### **1.2.1. PM-01-PS01: Communicate in a retail environment**

##### ***Scope of Practical Skill***

Given a case study in which a manager communicated both well and badly and which had positive and negative effects on the store the learner must be able to:

- PA0101 Identify the successful communication and its impact on the staff and store
- PA0102 Identify the negative and unsuccessful communication and its impact on the staff and store
- PA0103 Propose how the negative communication could have been handled to make it positive and successful and to have a positive impact on the staff and store

##### ***Applied Knowledge***

- AK0101 Techniques for analysing case studies
- AK0102 Positive communication techniques
- AK0103 Negative communication techniques

##### ***Internal Assessment Criteria***

- IAC0101 The successful communication is identified along with its impact on the staff and business as per the given case study
- IAC0102 The negative and unsuccessful communication is identified along with its impact on the staff and store as per the given case study

- IAC0103 The proposal on how the negative communication could have been handled to make it positive and successful is practical and would have the desired effect of having a positive impact on the staff and store

### **1.2.2. PM-01-PS02: Manage meeting processes**

#### ***Scope of Practical Skill***

Given a variety of in-store meeting scenarios including daily operational focused meetings, and investigative and problem solving meetings the learner must be able to:

- PA0201 Plan and prepare for the meetings
- PA0202 Manage the meetings
- PA0203 Analyse and deal with obstructive or time wasting behaviour
- PA0204 Compile follow-up documentation and specify actions required

#### ***Applied Knowledge***

- AK0201 Presentation techniques applicable to in-store meetings
- AK0202 Communication techniques
- AK0203 Meeting etiquette and protocols
- AK0204 Meeting structure and documentation
- AK0205 Techniques for keeping meetings on track
- AK0206 Techniques for dealing with time-wasting or obstructive behaviour

#### ***Internal Assessment Criteria***

- IAC0201 The planning and preparation ensures all attendees know of the meeting and are given the agenda in advance and any required visual aids are readied
- IAC0202 The meeting is managed in a manner that encourages participation and gets the message across in a clear and concise manner
- IAC0203 Obstructive behaviour and time wasting is identified and handled in a constructive manner
- IAC0204 Minutes of the meeting are accurate and follow up action identified and recorded

### **1.2.3. PM-01-PS03: Manage people dynamics**

#### ***Scope of Practical Skill***

Given a variety of case studies related to customer, supplier and employee problems and grievances, individual conflicts, discrimination and interpersonal conflicts the learner must be able to:

- PA0301 Determine signs of unhappiness, resentments, disagreements or conflict
- PA0302 Clarify underlying causes and issues, including diversity and ethics

- PA0303 Determine and propose the most appropriate options for dealing with interpersonal conflict, including external help applicable to the retail chain store environment
- PA0304 Develop action plans for reducing resentment or conflict

### ***Applied Knowledge***

- AK0301 Techniques for identifying signs and possible causes of unhappiness, resentment or conflicts
- AK0302 Techniques for dealing with and defusing emotions
- AK0303 External options for conflict resolution applicable to the retail chain store environment
- AK0304 Techniques for maintaining self-control and for showing respect
- AK0305 Techniques for resolving unhappiness, resentments, disagreements or conflict
- AK0306 Active listening techniques
- AK0307 Techniques for recognising and addressing diversity issues

### ***Internal Assessment Criteria***

- IAC0301 Signs of unhappiness, resentments, disagreements or conflict are recognised according to the information in the case study
- IAC0302 The underlying causes and issues, are recognised as applicable to the case study
- IAC0303 The options proposed for dealing with interpersonal conflict are practical for a chain store manager and applicable to the situation and would have the desired effect of resolving the issue
- IAC0304 The action plans developed are practical and appropriate to the situation and would have the desired effect of minimising the resentment or conflict

## **1.2.4. PM-01-PS04: Evaluate employee performance**

### ***Scope of Practical Skill***

Given a case study detailing performance standards required in a retail chain store and the performance standards being delivered along with the policies and procedures of the organisation the learner must be able to:

- PA0401 Analyse performance standards and identify where performance meets, exceeds and falls short of required standards
- PA0402 Propose action to take where performance meets or exceeds required performance

- PA0403 Propose action to take where performance falls short of required performance

### ***Applied Knowledge***

- AK0401 Performance evaluation techniques
- AK0402 Techniques for encouraging improvement where standards meet or exceed required performance
- AK0403 Techniques for correcting performance standards where standards fall short of required performance
- AK0404 Feedback and counselling techniques

### ***Internal Assessment Criteria***

- IAC0401 The analyses of staff performance identifies where performance exceeds, meets and falls short of required performance as detailed in the case study
- IAC0402 The action proposed where performance meets or exceeds required performance is practical, to given policy and would have the desired effect of encouraging the staff member to continue their level of performance
- IAC0403 The action proposed where performance falls short of required performance is practical, to given policy and would have the desired effect of encouraging the staff member to improve their performance

## **1.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- Learning material covering the managing of retail chain store employee performance
- Case studies, scenarios or DVDs,

### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

### ***Legal Requirements:***

- A legal business entity
- Meet health and safety standards

#### 1.4 Exemptions

- None



## **2. 142103001-PM-02, Manage retail chain store operational processes, NQF Level 5, Credits 2**

### **2.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to manage retail chain store operational processes

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-02-PS01: Manage retail chain store operational processes
- PM-02-PS02: Manage and control work processes

### **2.2 Guidelines for Practical Skills**

#### **2.2.1. PM-02-PS01: Manage retail chain store operational processes**

##### ***Scope of Practical Skill***

Given a variety of scenarios comprising typical operational activities of a retail chain store, expected time taken for each activity and staffing levels the learner must be able to:

- PA0101 Determine priorities and develop operational plans for daily and weekly activities
- PA0102 Decide on permanent and non permanent staffing required to complete required work
- PA0103 Schedule staff and allocate staffing to all activities

##### ***Applied Knowledge***

- AK0101 Techniques for analysing and prioritising operational requirements
- AK0102 Techniques for developing operational plans
- AK0103 Staff scheduling techniques
- AK0104 Techniques for calculating the cost of non permanent staff
- AK0105 Techniques for allocating staff to achieve operational plans

##### ***Internal Assessment Criteria***

- IAC0101 The operational plans allocate activities to daily and weekly schedules and prioritise activities as detailed in the case study
- IAC0102 The plans identify the permanent staff that can be allocated to the plans and identify non permanent staff required to complete required work according to the case study

- IAC0103 Staff is scheduled to minimise costs to the store while ensuring all activities would be completed within required timeframes

### **2.2.2. PM-02-PS02: Manage and control work processes**

#### ***Scope of Practical Skill***

Given a variety of scenarios detailing operational action plans compiled along with the success of the implementation with details of those meeting deadlines as well as those not meeting deadlines with reasons such as staff not coming to work, staff ill and working slowly, staff unhappy and not working to standard and other activities suddenly required with urgency the learner must be able to:

- PA0201 Identify where activities are not going to be completed by deadlines
- PA0202 Propose action to ensure activities are completed by deadline
- PA0203 Reschedule staff to complete new urgent activities

#### ***Applied Knowledge***

- AK0201 Techniques for monitoring the implementation of operational plans
- AK0202 Possible corrective action where activities are not going to plan
- AK0203 Techniques for rescheduling where new and urgent activities are suddenly required

#### ***Internal Assessment Criteria***

- IAC0201 The success of the implementation of the action plan is analysed and all those actions that would not be completed by deadline are identified along with the cause as per the given scenario
- IAC0202 The corrective action proposed is practical and would have the desired effect of ensuring the task is completed in time
- IAC0203 Staffing is rescheduled to ensure the new activity is completed in time without delaying the other activities in the operation plan

### **2.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Learning material covering the managing retail chain store operational processes
- Scenarios or DVDs,

#### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners

- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

## **2.4 Exemptions**

- None

### **3. 142103001-PM-03, Manage retail chain store service standards, NQF Level 5, Credits 2**

#### **3.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice managing the standards of service in a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-03-PS01: Plan and control housekeeping activities
- PM-03-PS02: Plan and control health and safety activities
- PM-03-PS03: Determine customer service requirements and plan to achieve these requirements

#### **3.2 Guidelines for Practical Skills**

##### **3.2.1. PM-03-PS01: Plan and control housekeeping activities**

##### ***Scope of Practical Skill***

Given pictures showing examples of housekeeping in a retail chain store the learner must be able to:

- PA0101 Develop a schedule for monitoring housekeeping in a retail chain store
- PA0102 Evaluate the housekeeping standards in a retail chain store
- PA0103 Develop action plans to improve housekeeping in a retail chain store that takes into account customer service priorities

##### ***Applied Knowledge***

- AK0101 Techniques for developing schedules for monitoring housekeeping standards
- AK0102 Evaluation techniques
- AK0103 Techniques for evaluating and prioritising actions required
- AK0104 Techniques for developing action plans

##### ***Internal Assessment Criteria***

- IAC0101 The schedule developed takes into account all aspects of housekeeping to be monitored in a retail store
- IAC0102 The evaluation of the housekeeping standards identifies all aspects requiring improvement in the pictures given

- IAC0103 The action plans proposed take into account all points requiring improvement and prioritise them taking into account those that would impact on customer service first

### **3.2.2. PM-03-PS02: Plan and control health and safety activities**

#### ***Scope of Practical Skill***

Given scenarios of the health and safety performance in a retail chain store, some of which meet required standards and some of which do not meet required standards and the required standards the learner must be able to:

- PA0201 Analyse and identify the performances that meet health and safety requirements
- PA0202 Analyse and identify the performances that fall short of the required health and safety requirements
- PA0203 Develop action plans to address all issues that fall short of required standards

#### ***Applied Knowledge***

- AK0201 Techniques for analysing case studies
- AK0202 Techniques for identifying shortfalls in performance
- AK0203 Techniques for developing action plans

#### ***Internal Assessment Criteria***

- IAC0201 All performances meeting health and safety requirements are identified in terms of the scenario given
- IAC0202 All performances not meeting health and safety requirements are identified in terms of the scenario given
- IAC0203 The action plan developed is practical and would have the desired effect of ensuring the health and safety issues not meeting standards would be corrected and would meet the required standards

### **3.2.3. PM-03-PS03: Determine customer service requirements and plan to achieve these requirements**

#### ***Scope of Practical Skill***

Given sets of information comprising the target market of the store, data on products and customer service delivery and customer comments on service the learner must be able to:

- PA0301 Determine and propose customer service standards requirements for a variety of target markets

- PA0302 Analyse information and identify shortcomings in service delivery
- PA0303 Develop action plans to meet customer service requirements

### ***Applied Knowledge***

- AK0301 Techniques for matching service standards to different target markets
- AK0302 Techniques for analysing information and identify shortcomings
- AK0303 Techniques for developing action plans

### ***Internal Assessment Criteria***

- IAC0301 The service standards proposed meet the expectations of the target markets given
- IAC0302 Areas of shortfalls in service delivery are all identified in terms of the scenario given
- IAC0303 The plans developed will result in resolution of the service delivery problems and are achievable and cost effective

## **3.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- Learning material covering the managing retail chain store service standards
- Scenarios or DVDs, Pictures or photographs, Sets of information

### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

### ***Legal Requirements:***

- A legal business entity
- Meet health and safety standards

## **3.4 Exemptions**

- None

#### **4. 142103001-PM-04, Maintain effective retail chain store stakeholder relations, NQF Level 5, Credits 2**

##### **4.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice maintaining stakeholder relations of a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-04-PS01: Maintain effective relations with stakeholders within the organisation
- PM-04-PS02: Maintain effective relations with stakeholders external to the organisation

##### **4.2 Guidelines for Practical Skills**

##### **4.2.1. PM-04-PS01: Maintain effective relations with stakeholders within the organisation**

###### ***Scope of Practical Skill***

Given sets of information comprising typical data on a variety of chain store stakeholders within the organisation, the current relationships some of which are bad and the reason for this, and problems experienced by the store that involve the given stakeholders the learner must be able to:

- PA0101 Determine all the stakeholders involved
- PA0102 Discuss the expectations of the different parties
- PA0103 Describe how the store manager can solve store problems involving the different stakeholders while maintaining or improving current relationships

###### ***Applied Knowledge***

- AK0101 Techniques for identifying stakeholders within the organisation
- AK0102 Techniques for identifying their roles and expectations and the expectations of the retail chain store manager
- AK0103 Relationship building techniques applicable to the different stakeholders

###### ***Internal Assessment Criteria***

- IAC0101 The list of stakeholders identifies all stakeholders in the scenario given
- IAC0102 The expectations of all parties identified is practical and applicable to a retail chain store organisation

- IAC0103 The explanation of how the store manager can solve problems involving the stakeholders are practical and would have the effect of maintaining good relationships and improving bad relationships

#### **4.2.2. PM-04-PS02: Maintain effective relations with stakeholders external to the organisation**

##### ***Scope of Practical Skill***

Given sets of information comprising typical data on a variety of chain store stakeholders external to the organisation, the current relationships some of which are bad and the reason for this, and problems experienced by the store that involve the given stakeholders the learner must be able to:

- PA0201 Determine all the stakeholders involved
- PA0202 Discuss the expectations of the different parties
- PA0203 Explain how the store manager can solve store problems involving the different stakeholders while maintaining or improving current relationships

##### ***Applied Knowledge***

- AK0201 Techniques for identifying stakeholders external to the organisation
- AK0202 Techniques for identifying their roles and expectations and the expectations of the retail chain store manager
- AK0203 Relationship building techniques applicable to the different stakeholders

##### ***Internal Assessment Criteria***

- IAC0201 The list of stakeholders identifies all stakeholders in the scenario given
- IAC0202 The expectations of all parties identified is practical and applicable to a retail chain store organisation and its external stakeholders
- IAC0203 The explanation of how the store manager can solve store problems involving the stakeholders are practical and would have the effect of maintaining good relationships and improving bad relationships

#### **4.3 Provider Programme Accreditation Criteria**

##### ***Physical Requirements:***

- Learning material covering maintaining effective retail chain store stakeholder relations
- Sets of information

##### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance



- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

**4.4 Exemptions**

- None

## **5. 142103001-PM-05, Manage stock control in a retail chain store, NQF Level 5, Credits 3**

### **5.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to manage stock control in a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learner will be required to:

- PM-05-PS01: Manage operational tasks impacting on the management of stock balances
- PM-05-PS02: Manage under, over and dead stock situations

### **5.2 Guidelines for Practical Skills**

#### **5.2.1. PM-05-PS01: Manage operational tasks impacting on the management of stock balances**

##### ***Scope of Practical Skill***

Given information on the type of retail chain store and its operational processes involved in stock control, the learner must be able to:

- PA0101 Develop a checklist to monitor all aspects of operations in the store that will impact on accurate stock balances
- PA0102 Develop a schedule to monitor all aspects on the above checklist

##### ***Applied Knowledge***

- AK0101 Techniques for developing monitoring checklists
- AK0102 Techniques for analysing operations so that all aspects of stock control are identified
- AK0103 Techniques for developing schedules

##### ***Internal Assessment Criteria***

- IAC0101 The checklist includes the operational aspects of stock counts, stock receipts and dispatch, the recording of these aspects, packing in the stockroom, merchandising and filling of shop floor displays and recording of sales
- IAC0102 The monitoring schedule is practical and ensures all aspects are monitored at least weekly

### **5.2.2. PM-05-PS02: Manage under, over and dead stock situations**

#### ***Scope of Practical Skill***

Given sets of information comprising organisational policies and procedures, the organisation's supply chain and details of current stock on hand, outstanding orders, sales history sales forecasts and information on lead times the learner must be able to:

- PA0201 Calculate and identify overstocks that need to be eliminated
- PA0202 Calculate and identify under stocks that need to be reordered
- PA0203 Calculate and identify dead stocks that needs to be eliminated
- PA0204 Communicate with stakeholders in the supply chain to correct these problem areas
- PA0205 Calculate quantities to order for products that are store orderable

#### ***Applied Knowledge***

- AK0201 Methods for calculating stock performance
- AK0202 Actions for rectifying stock problems in a retail chain store environment
- AK0203 Techniques for communicating stock problems to stakeholders
- AK0204 Techniques for calculating orders

#### ***Internal Assessment Criteria***

- IAC0201 The overstock that need to be eliminated are identified according to the information in the scenario given
- IAC0202 The under stocks that need to be reordered are identified according to the information in the scenario given
- IAC0203 The dead stock that need to be eliminated is identified according to the information in the scenario given
- IAC0204 The communication lists all products requiring action and gives detailed information on the performance of the stock and practical proposals to eliminate the stock problems
- IAC0205 All products orderable at store level are identified and accurate orders calculated based on the information given

### **5.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Learning material covering managing stock control in a retail chain store
- Sets of information, Calculators

*Human Resource Requirements:*

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

**5.4 Exemptions**

- None

## **6. 142103001-PM-06, Propose improvements to a retail chain store's range and layout, NQF Level 5, Credits 2**

### **6.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice influencing the range of stock carried and layouts in a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-06-PS01: Propose improvements to range and product mix
- PM-06-PS02: Propose improvements to layouts

### **6.2 Guidelines for Practical Skills**

#### **6.2.1. PM-06-PS01: Propose improvements to range and product mix**

##### ***Scope of Practical Skill***

Given sets of information comprising the target market of a store and details of ranges and products the learner must be able to:

- PA0101 Analyse existing store range and target market requirements
- PA0102 Compare existing store range and target market requirements and identify where range does not meet requirements
- PA0103 Propose to Head Office a change to store range detailing products to be dropped and products that should be considered

##### ***Applied Knowledge***

- AK0101 Analysing techniques
- AK0102 Techniques for writing proposals
- AK0103 Stock performance measures
- AK0104 Techniques for analysing target markets and their shopping behaviours

##### ***Internal Assessment Criteria***

- IAC0101 Items not fitting the range expected of the target market are identified in terms of the scenario given
- IAC0102 The products proposed be introduced match the requirements of the given target market
- IAC0103 The proposal to Head Office identifies the unwanted merchandise and new merchandise required and details measurements used and uses retail terminology in context

### **6.2.2. PM-06-PS02: Propose improvements to layouts**

#### ***Scope of Practical Skill***

Given sets of information comprising stock performance and a floor plan showing layouts of categories within the store, the target market of the store and margins of different categories of stock the learner must be able to:

- PA0201 Determine customer profiles, needs and buying behaviour
- PA0202 Evaluate the positioning of the various categories
- PA0203 Propose to Head Office recommend changes to layouts based on target market of the branch

#### ***Applied Knowledge***

- AK0201 Analysing techniques
- AK0202 Techniques for writing proposals
- AK0203 Techniques for matching shopping expectations to target markets

#### ***Internal Assessment Criteria***

- IAC0201 The customer profile of the store is determined along with their buying habits in terms of the given target market
- IAC0202 The positioning of the various categories is evaluated in terms of their margins and sales
- IAC0203 The proposal to Head Office identifies categories of merchandise that should be promoted and others that should not be promoted and details measurements used and uses retail terminology in context in suggesting new layouts to the store

### **6.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Learning material covering proposing improvements to a retail chain store's range and layout
- Sets of information

#### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'

- Assessors must have relevant industry experience related to the subject.

*Legal Requirements:*

- A legal business entity
- Meet health and safety standards

**6.4 Exemptions**

- None

## **7. 142103001-PM-07, Implement plans to improve sales in a retail chain store, NQF**

### **Level 5, Credits 2**

#### **7.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice drawing up and implementing plans to improve sales in a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-07-PS01: Break up budgets and set individual targets
- PM-07-PS02: Merchandise promotional product and display ticketing

#### **7.2 Guidelines for Practical Skills**

##### **7.2.1. PM-07-PS01: Break up budgets and set individual targets**

##### ***Scope of Practical Skill***

Given sets of information comprising the different departments and categories within a store, percentage of floor space per department, historical sales data per department and total sales budget for the store for a month the learner must be able to:

- PA0101 Calculate individual targets for each departments and category by breaking up the store's total sales target
- PA0102 Calculate weekly sales targets for each departments and category by breaking up each departments and category's monthly sales target

##### ***Applied Knowledge***

- AK0101 Techniques for breaking up monthly sales budgets into departmental and category targets
- AK0102 Techniques for breaking up monthly sales budgets into weekly sales targets based on expected trading patterns of each week
- AK0103 Techniques for identifying trading patterns throughout a month

##### ***Internal Assessment Criteria***

- IAC0101 The monthly sales budget is spread appropriately between the departments and categories
- IAC0102 The monthly target for each departments and category is broken up into weekly targets based on expected trading patterns according to the week of the month



### **7.2.2. PM-07-PS02: Merchandise promotional product and display ticketing**

#### ***Scope of Practical Skill***

Given sets of information comprising typical promotional information, product, , staff levels, display instructions, time taken to complete each task and display methods the learner must be able to:

- PA0201 Develop an action plan with staffing schedules and activities to ensure the products and ticketing are displayed
- PA0202 Develop a schedule for staff to ensure all tasks are completed

#### ***Applied Knowledge***

- AK0201 Techniques for developing action plans
- AK0202 Techniques for scheduling staff

#### ***Internal Assessment Criteria***

- IAC0201 The action plan covers all required tasks and will ensure all stock and ticketing is displayed as instructed
- IAC0202 The schedule developed will ensure sufficient staff are available to complete the required tasks as per the action plan

### **7.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Learning material covering implementing plans to improve sales in a retail chain store
- Sets of information, Calculators

#### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

#### ***Legal Requirements:***

- A legal business entity
- Meet health and safety standards

### **7.4 Exemptions**

- None

## **8. 142103001-PM-08, Implement plans to improve a retail chain store's financial performance, NQF Level 5, Credits 2**

### **8.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice analysing store financial printouts and developing action plans to improve the financial performance of a retail chain store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 3 days

The learner will be required to:

- PM-08-PS01: Analyse and interpret chain store financial performance reports
- PM-08-PS02: Plan corrective actions to improve financial performance

### **8.2 Guidelines for Practical Skills**

#### **8.2.1. PM-08-PS01: Analyse and interpret chain store financial performance reports**

##### ***Scope of Practical Skill***

Given typical chain store financial reports covering income and expenditure for the current year, the past year to date and the budgets for the year and inflation for the past year the learner must be able to:

- PA0101 Analyse and interpret chain store financial reports
- PA0102 Report on financial performance to budget
- PA0103 Report on financial performance this year compared to last year

##### ***Applied Knowledge***

- AK0101 Techniques for analysing and interpreting chain store financial report
- AK0102 Techniques for calculating financial performance
- AK0103 Report writing techniques

##### ***Internal Assessment Criteria***

- IAC0101 The analyses of the financial reports are accurate
- IAC0102 The report highlights both acceptable and unacceptable areas of performance in terms of the store's budget
- IAC0103 The report highlights both acceptable and unacceptable areas of performance in terms of the year's performance compared to the previous year's performance

### **8.2.2. PM-08-PS02: Plan corrective actions to improve financial performance**

#### ***Scope of Practical Skill***

Given the analyses of the financial reports in the previous practical skills the learner must be able to:

- PA0201 Develop an action plan to correct identified shortfalls in financial performance
- PA0202 Develop an action plan to further improve areas of acceptable performance that can be improved

#### ***Applied Knowledge***

- AK0201 Corrective actions applicable to shortfalls in financial performance in a chain store
- AK0202 Actions to further improve acceptable financial performance
- AK0203 Techniques for developing action plans

#### ***Internal Assessment Criteria***

- IAC0201 The action plan to correct areas of shortfall in financial performance are practical and achievable
- IAC0202 The action plan to further improve areas of acceptable financial performance are practical and achievable

### **8.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Learning material covering implementing plans to improve a retail chain store's financial performance
- Typical chain store financial reports

#### ***Human Resource Requirements:***

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

#### ***Legal Requirements:***

- A legal business entity

- Meet health and safety standards

#### **8.4 Exemptions**

- None

## **9. 142103001-PM-09, Manage risk and maintain assets in a retail chain store, NQF**

### **Level 5, Credits 3**

#### **9.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to practice identifying, evaluating and mitigating a variety of risks encountered in a retail chain store and to manage the assets of the store

Learning contract time, the total amount of time during which the learner needs to have access to the provider to enable him or her sufficient time to obtain the required knowledge and complete activities, assignments and research (if any) as well as required to prepare for and complete assessments is 4 days

The learner will be required to:

- PM-09-PS01: Identify and assess areas of risk in a retail chain store
- PM-09-PS02: Manage the reduction of shrinkage and losses
- PM-09-PS03: Manage assets

#### **9.2 Guidelines for Practical Skills**

##### **9.2.1. PM-09-PS01: Identify and assess areas of risk in a retail chain store**

###### ***Scope of Practical Skill***

Given information regarding a typical chain store and sets of information comprising typical company policies, procedures, list of high risk stocks, reason for lost sales and lost customers, examples of miscommunication and non-compliance within the store that causes loss and negligence and reports of crime in the area the learner must be able to:

- PA0101 Develop checklists to analyse the risks to the store
- PA0102 Assess the risks to the store

###### ***Applied Knowledge***

- AK0101 Types and areas of risk in retail
- AK0102 Techniques for identifying risk
- AK0103 Techniques for prioritising risks
- AK0104 Techniques for compiling checklists
- AK0105 Techniques for analysing reports to determine areas of risk

###### ***Internal Assessment Criteria***

- IAC0101 The checklist developed identifies areas of risk in a retail chain store including opening and closing, cash control, stock control, receiving and dispatch risk and the risk of robbery and unauthorised entry to the store
- IAC0102 The risk assessment using the developed checklist identifies all areas of risk as detailed in the case study

### **9.2.2. PM-09-PS02: Manage the reduction of shrinkage and losses**

#### ***Scope of Practical Skill***

Given a variety of typical shrinkage and loss scenarios, data such as quantities, values, receipts, sales, stock count information, policies and procedures, shrinkage and loss guidelines, measurement criteria and data, causes of waste and damage the learner must be able to:

- PA0201 Analyse. identify and report on areas where shrinkage and losses occurred
- PA0202 Compile action plans to reduce further shrinkage and losses

#### ***Applied Knowledge***

- AK0201 Techniques for analysing case studies
- AK0202 Techniques for identifying causes of shrinkage and losses
- AK0203 Techniques for developing action plans

#### ***Internal Assessment Criteria***

- IAC0201 The causes of shrinkage are identified and reported on in terms of the information in the case study
- IAC0202 The action plans are relevant and feasible and within legal framework and address the factors causing shrinkage and losses to the store

### **9.2.3. PM-09-PS03: Manage assets**

#### ***Scope of Practical Skill***

Given information on the assets of a retail chain store, and their uses along with which assets are under contract and which require contacting of a repair agent, documentation required to be completed when calling in a repair agent and documentation to be completed when a contracted agent calls and a case study detailing the breakdown of an asset not covered by maintenance contracts the learner must be able to:

- PA0301 Develop a cleaning schedule applicable to the various assets in the store
- PA0302 Complete the documentation for a scheduled, contracted maintenance call
- PA0303 Complete the documentation for an unscheduled repair of an asset not covered by a maintenance contract.

#### ***Applied Knowledge***

- AK0301 Techniques for identifying the frequency for cleaning of assets
- AK0302 Techniques for developing schedules
- AK0303 Techniques for completing documentation for scheduled and unscheduled maintenance/repair of assets call outs

#### ***Internal Assessment Criteria***

- IAC0301 The schedule developed takes into account trading patterns and minimises disruption to the business and customer service
- IAC0302 The documentation for the scheduled contracted maintenance call details the contractor, the date and scheduled maintenance completed
- IAC0303 The documentation for the unscheduled repair not covered by maintenance contract details the repair agent, work completed, time taken and costs

### **9.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Learning material covering managing risk and maintain assets in a retail chain store Scenarios, Information on assets

#### *Human Resource Requirements:*

- Facilitators to have relevant knowledge and experience in managing supplier and merchandise performance
- Ratio of 1 facilitator to maximum of 15 learners
- Persons compiling the internal assessments must have either an industry related qualification at least one level higher than this qualification, or have operated as retail chain store manager or higher for at least 3 years'
- Assessors must have relevant industry experience related to the subject.

#### *Legal Requirements:*

- A legal business entity
- Meet health and safety standards

### **9.4 Exemptions**

- None



**SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS**

## List of Work Experience Module Specifications

- 142103001-WM-01, Processes and procedures for planning and implementing retail chain store operations, NQF Level 5, Credits 9
- 142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment, NQF Level 4, Credits 8
- 142103001-WM-03, Processes and procedures for managing retail chain store service standards, NQF Level 5, Credits 8
- 142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations, NQF Level 5, Credits 4
- 142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout, NQF Level 5, Credits 8
- 142103001-WM-06, Processes and procedures for improving the retail chain store's bottom line, NQF Level 5, Credits 8
- 142103001-WM-07, Processes and procedures for managing sales and promotional activities, NQF Level 5, Credits 6
- 142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store, NQF Level 5, Credits 8

## **1. 142103001-WM-01, Processes and procedures for planning and implementing retail chain store operations, NQF Level 5, Credits 9**

### **1.1 Purpose of the Work Experience Modules**

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

### **1.2 Guidelines for Work Experiences**

#### **1.2.1. WM-01-WE01: Plan daily and weekly operations**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

##### ***Supporting Evidence***

- 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

### **1.2.2. WM-01-WE02: Hold operational meetings**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Participate constructively in at least five operational meetings in the retail chain store
- WA0202 Hold at least 10 operational meetings

#### ***Supporting Evidence***

- 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

### **1.3 Contextualised Workplace Knowledge**

- 1 Organisational methods, policies and procedures for scheduling staff
- 2 Organisational policies and procedures for holding in-store operational meetings
- 3 Organisational policies and procedures for planning and scheduling operational tasks
- 4 Organisational policies and procedures for recording minutes of operational in-store meetings

### **1.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

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

#### *Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

#### *Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

### **1.5 Additional Assignments to be Assessed Externally**

None

## **2. 142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment, NQF Level 4, Credits 8**

### **2.1 Purpose of the Work Experience Modules**

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

### **2.2 Guidelines for Work Experiences**

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

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Motivate a team to achieve operational objectives
- WA0102 Organise and control the work of a team to achieve operational objectives and standards

##### ***Supporting Evidence***

- 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

#### **2.2.2. WM-02-WE02: Improve staff performance**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

### ***Supporting Evidence***

- 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

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

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

#### ***Supporting Evidence***

- 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

### **2.3 Contextualised Workplace Knowledge**

- 1 Organisational policies and procedures for motivating store staff
- 2 Organisational policies and procedures for managing staff
- 3 The organisations informal disciplinary procedure
- 4 The organisation's formal disciplinary procedures
- 5 Organisational policies and procedures for counselling staff
- 6 The organisation's performance management policies and procedures
- 7 Organisational policies and procedures for inducting store staff
- 8 The organisation's forms to be completed when inducting a staff member into a store

### **2.4 Criteria for Workplace Approval**

#### ***Physical Requirements:***

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

*Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

*Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

**2.5 Additional Assignments to be Assessed Externally**

None

### **3. 142103001-WM-03, Processes and procedures for managing retail chain store service standards, NQF Level 5, Credits 8**

#### **3.1 Purpose of the Work Experience Modules**

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

#### **3.2 Guidelines for Work Experiences**

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

###### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

###### ***Supporting Evidence***

- 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

### **3.2.2. WM-03-WE02: Manage customer shopping experience**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

#### ***Supporting Evidence***

- 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

### **3.3 Contextualised Workplace Knowledge**

1 Organisational health, safety and housekeeping standards, policies and procedures

2 Organisation's standards for customer service

3 Organisational policies and procedures for resolving customer queries and complaints

### **3.4 Criteria for Workplace Approval**

#### ***Physical Requirements:***

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

#### ***Human Resource Requirements:***

- Manager with at least 2 year experience in managing a retail chain store



*Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

**3.5 Additional Assignments to be Assessed Externally**

None

#### **4. 142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations, NQF Level 5, Credits 4**

##### **4.1 Purpose of the Work Experience Modules**

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

##### **4.2 Guidelines for Work Experiences**

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

###### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Evaluate the performance of at least 3 stakeholders within the organisation
- WA0102 Build or maintain effective relations with at least one internal stakeholder

###### ***Supporting Evidence***

- 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

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

###### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

###### ***Supporting Evidence***

- 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

#### **4.3 Contextualised Workplace Knowledge**

- 1 Organisational strategy in dealing with the various external stakeholders
- 2 Organisational policies and procedures for dealing with internal stakeholders

#### **4.4 Criteria for Workplace Approval**

##### *Physical Requirements:*

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

##### *Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

##### *Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

#### **4.5 Additional Assignments to be Assessed Externally**

None

## **5. 142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout, NQF Level 5, Credits 8**

### **5.1 Purpose of the Work Experience Modules**

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

### **5.2 Guidelines for Work Experiences**

#### **5.2.1. WM-05-WE01: Manage stock balances**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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.

##### ***Supporting Evidence***

- 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

#### **5.2.2. WM-05-WE02: Manage stock levels**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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 reduce stock shortages fortnightly for at least four months

#### ***Supporting Evidence***

- SE0201 Copies of orders placed by the learner and documentary evidence showing how these orders 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

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

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

#### ***Supporting Evidence***

- 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

### **5.3 Contextualised Workplace Knowledge**

1 Organisational in-store operational processes that impact on stock on hand balances

2 Organisational policies and procedures for all operational processes that impact on stock on hand balances

- 3 Organisational policies and procedures for the ordering of stock in store
- 4 Organisational policies and procedures for clearing overstocks and obsolete stock
- 5 Organisational policies and procedures for reducing stock shortages
- 6 Organisational policies and procedures for laying out and merchandising stores
- 7 Organisational policies and procedures for proposing changes to store layouts and ranges
- 8 The organisation's in store stock management reports

#### **5.4 Criteria for Workplace Approval**

##### *Physical Requirements:*

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

##### *Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

##### *Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

#### **5.5 Additional Assignments to be Assessed Externally**

None

## **6. 142103001-WM-06, Processes and procedures for improving the retail chain store's bottom line, NQF Level 5, Credits 8**

### **6.1 Purpose of the Work Experience Modules**

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

### **6.2 Guidelines for Work Experiences**

#### **6.2.1. WM-06-WE01: Analyse store performance reports**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

##### ***Supporting Evidence***

- SE0101 4 Store performance reports along with the learner's analyses and identification of entries that need to be improved

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

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

##### ***Supporting Evidence***

- 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

### **6.3 Contextualised Workplace Knowledge**

- 1 The organisation's store financial reports
- 2 Organisational policies and procedures for the analyses of store financial reports
- 3 Organisational policies and procedures for increasing sales and Gross Profit
- 4 Organisational policies and procedures for reducing expenses

### **6.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

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

#### *Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

#### *Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

### **6.5 Additional Assignments to be Assessed Externally**

None



## **7. 142103001-WM-07, Processes and procedures for managing sales and promotional activities, NQF Level 5, Credits 6**

### **7.1 Purpose of the Work Experience Modules**

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

### **7.2 Guidelines for Work Experiences**

#### **7.2.1. WM-07-WE01: Manage sales activity**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

##### ***Supporting Evidence***

- 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.

### **7.2.2. WM-07-WE02: Implement promotional activity**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

#### ***Supporting Evidence***

- 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

### **7.3 Contextualised Workplace Knowledge**

- 1 Organisational policies and procedures for breaking monthly sales targets into daily and weekly targets
- 2 Organisational policies and procedures for allocating sales target to departments or categories
- 3 Organisational policies and procedures for promoting sales in store
- 4 Organisational policies and procedures for notifying promotional activity
- 5 Organisational policies and procedures for building promotional displays
- 6 Organisational policies and procedures for ticketing promotional displays
- 7 Organisational policies and procedures for maintaining promotional display standards throughout the life of a promotion

### **7.4 Criteria for Workplace Approval**

#### ***Physical Requirements:***

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

#### ***Human Resource Requirements:***

- Manager with at least 2 year experience in managing a retail chain store

#### ***Legal Requirements:***

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

### **7.5 Additional Assignments to be Assessed Externally**

None

## **8. 142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store, NQF Level 5, Credits 8**

### **8.1 Purpose of the Work Experience Modules**

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

### **8.2 Guidelines for Work Experiences**

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

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

##### ***Supporting Evidence***

- 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

### **8.2.2. WM-08-WE02: Maintain assets**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- 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

#### ***Supporting Evidence***

- 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

### **8.3 Contextualised Workplace Knowledge**

- 1 Areas of risk in the store
- 2 Organisational procedures and reports used to identify products at risk in the store
- 3 Organisational policies and procedures for minimising risk
- 4 The organisation's asset register and policies and procedures for controlling assets
- 5 Store's assets under maintenance contract

6 Organisational policies and procedures for managing store assets under maintenance contract

7 Organisational policies and procedures for maintaining and repairing store assets not under maintenance contract

8 Organisational policies and procedures for calling in of repair agents

9 Organisational policies and procedures for completing of documentation for asset maintenance

10 organisation's policy and procedures for the handling of internal theft

11 Organisational policies and procedures for handling of shoplifting incidents

#### **8.4 Criteria for Workplace Approval**

##### *Physical Requirements:*

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

##### *Human Resource Requirements:*

- Manager with at least 2 year experience in managing a retail chain store

##### *Legal Requirements:*

- Registered as a formal business
- Compliant with all relevant legal requirements for a wholesale or retail business

#### **8.5 Additional Assignments to be Assessed Externally**

None

**SECTION 4: STATEMENT OF WORK EXPERIENCE**

<b>Curriculum Number:</b>	142103001
<b>Curriculum Title:</b>	Retail Chain Store Manager

<b>Learner Details</b>	
<b>Name:</b>	
<b>ID Number:</b>	

<b>Employer Details</b>	
<b>Company Name:</b>	
<b>Address:</b>	
<b>Supervisor Name:</b>	
<b>Work Telephone:</b>	
<b>E-Mail:</b>	

**142103001-WM-01, Processes and procedures for planning and implementing retail chain store operations, NQF Level 5, Credits 9**

WM-01-WE01	Plan daily and weekly operations		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-01-WE02	Hold operational meetings		
	<b>Scope Work Experience</b>	Date	Signature
WA0201	Participate constructively in at least five operational meetings in the retail chain store		
WA0202	Hold at least 10 operational meetings		
	<b>Supporting Evidence</b>	Date	Signature

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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational methods, policies and procedures for scheduling staff		
2	Organisational policies and procedures for holding in-store operational meetings		
3	Organisational policies and procedures for planning and scheduling operational tasks		
4	Organisational policies and procedures for recording minutes of operational in-store meetings		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**142103001-WM-02, Processes and procedures for leading teams in a retail chain store environment, NQF Level 4, Credits 8**

WM-02-WE01	Lead teams to achieve operational objectives		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Motivate a team to achieve operational objectives		
WA0102	Organise and control the work of a team to achieve operational objectives and standards		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-02-WE02	Improve staff performance		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-02-WE03	Induct a new staff member into the store		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised</b>	Date	Signature
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	<b>Workplace Knowledge</b>		
1	Organisational policies and procedures for motivating store staff		
2	Organisational policies and procedures for managing staff		
3	The organisations informal disciplinary procedure		
4	The organisation's formal disciplinary procedures		
5	Organisational policies and procedures for counselling staff		
6	The organisation's performance management policies and procedures		
7	Organisational policies and procedures for inducting store staff		
8	The organisation's forms to be completed when inducting a staff member into a store		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**142103001-WM-03, Processes and procedures for managing retail chain store service standards, NQF Level 5, Credits 8**

WM-03-WE01	Manage health, safety and housekeeping		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-03-WE02	Manage customer shopping experience		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
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1	Organisational health, safety and housekeeping standards, policies and procedures		
2	Organisation's standards for customer service		
3	Organisational policies and procedures for resolving customer queries and complaints		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**142103001-WM-04, Processes and procedures for maintaining effective retail chain store stakeholder relations, NQF Level 5, Credits 4**

WM-04-WE01	Maintain or build effective internal stakeholder relations		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Evaluate the performance of at least 3 stakeholders within the organisation		
WA0102	Build or maintain effective relations with at least one internal stakeholder		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-04-WE02	Maintain or build effective external stakeholder relations		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational strategy in dealing with the various external stakeholders		
2	Organisational policies and procedures for dealing with internal stakeholders		

	<b>Additional Assignments</b>	Date	Signature
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	<b>to be Assessed Externally</b>		
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**142103001-WM-05, Processes and procedures for managing stock levels and influencing store range and layout, NQF Level 5, Credits 8**

WM-05-WE01	Manage stock balances		
	<b>Scope Work Experience</b>	Date	Signature
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.		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-05-WE02	Manage stock levels		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-05-WE03	Propose range and layout improvement		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational in-store operational processes that impact on stock on hand balances		
2	Organisational policies and procedures for all operational processes that impact on stock on hand balances		
3	Organisational policies and procedures for the ordering of stock in store		
4	Organisational policies and procedures for clearing overstocks and obsolete stock		
5	Organisational policies and procedures for reducing		

	stock shortages		
6	Organisational policies and procedures for laying out and merchandising stores		
7	Organisational policies and procedures for proposing changes to store layouts and ranges		
8	The organisation's in store stock management reports		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**142103001-WM-06, Processes and procedures for improving the retail chain store's bottom line, NQF Level 5, Credits 8**

WM-06-WE01	Analyse store performance reports		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
SE0101	4 Store performance reports along with the learner's analyses and identification of entries that need to be improved		
WM-06-WE02	Plan and implement actions to improve the		

	store performance		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	The organisation's store financial reports		
2	Organisational policies and procedures for the analyses of store financial reports		
3	Organisational policies and procedures for increasing sales and Gross Profit		

4	Organisational policies and procedures for reducing expenses		
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	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**142103001-WM-07, Processes and procedures for managing sales and promotional activities, NQF Level 5, Credits 6**

WM-07-WE01	Manage sales activity		
	<b>Scope Work Experience</b>	Date	Signature
WA0101	Break 3 monthly sales budgets into weekly 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		
	<b>Supporting Evidence</b>	Date	Signature
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.		
WM-07-WE02	Implement promotional activity		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Organisational policies and procedures for breaking monthly sales targets into daily and weekly targets		
2	Organisational policies and procedures for allocating sales target to departments or categories		
3	Organisational policies and procedures for promoting sales in store		
4	Organisational policies and procedures for notifying promotional activity		
5	Organisational policies and procedures for building promotional displays		
6	Organisational policies and procedures for ticketing promotional displays		
7	Organisational policies and procedures for maintaining promotional display standards throughout the life of a promotion		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature

**142103001-WM-08, Processes and procedures for managing risk and maintaining assets in a retail chain store, NQF Level 5, Credits 8**

WM-08-WE01	Identify and manage areas of risk		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		
WM-08-WE02	Maintain assets		
	<b>Scope Work Experience</b>	Date	Signature
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		
	<b>Supporting Evidence</b>	Date	Signature
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		

	<b>Contextualised Workplace Knowledge</b>	Date	Signature
1	Areas of risk in the store		
2	Organisational procedures and reports used to identify products at risk in the store		
3	Organisational policies and procedures for minimising risk		
4	The organisation's asset register and policies and procedures for controlling assets		
5	Store's assets under maintenance contract		
6	Organisational policies and procedures for managing store assets under maintenance contract		
7	Organisational policies and procedures for maintaining and repairing store assets not under maintenance contract		
8	Organisational policies and procedures for calling in of repair agents		
9	Organisational policies and procedures for completing of documentation for asset maintenance		

10	organisation's policy and procedures for the handling of internal theft		
11	Organisational policies and procedures for handling of shoplifting incidents		

	<b>Additional Assignments to be Assessed Externally</b>	Date	Signature
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**ANNEXURE F:****Qualifications****NATIONAL DIPLOMA and B TECH: RETAIL BUSINESS MANAGEMENT –****OUTCOMES PER SUBJECT**

**ANNEXURE F:****Qualifications****NATIONAL DIPLOMA and B TECH: RETAIL BUSINESS MANAGEMENT –****OUTCOMES PER SUBJECT****A. NATIONAL DIPLOMA: RETAIL BUSINESS MANAGEMENT – OUTCOMES PER SUBJECT**

<b>1. BUSINESS MANAGEMENT 1</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
1.1 Develop a basic business plan for new business. (BM1A)	<ul style="list-style-type: none"> <li>• An effective programme has been compiled that will ensure the successful development of the entrepreneurial skills and weak points of the learner.</li> <li>• A viable business opportunity has been identified.</li> <li>• A workable basic business plan has been compiled for all the business functions of a business that will ensure the successful starting of a business.</li> </ul>
1.2 Manage the image of the retail business. (BM1B)	<ul style="list-style-type: none"> <li>• A strategic analysis report on the image of a retail business has been compiled that will indicate the strategic direction of the business.</li> <li>• An effective tactical image programme for a retail business has been compiled that will ensure successful image policies, budgets, action plans, procedures and controls.</li> <li>• The specifications for a corporate identity of a retail business has been developed that will ensure the required image for the retail business.</li> <li>• The relevant operational public relations functions for a retail business, that will ensure the required image with all the role players / stakeholders of a retail business, have effectively been planned and specified e.g. planning of social functions, conducting interviews with the media, public speaking at meetings, writing media reports writing business reports, publications and internal newsletters.</li> </ul>

<b>2. RETAIL BUSINESS MANAGEMENT 1</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
2.1 Nature of retail (RBM1A)	<ul style="list-style-type: none"> <li>▪ Define the nature of retail and retail business management</li> <li>▪ Demonstrate understanding of the historic developments in retail</li> <li>▪ Explain the features of retail and the role of retail in a community</li> <li>▪ Specify the different types of retail businesses</li> <li>▪ Identify available literature sources on retail</li> <li>▪ Identify careers in retail</li> <li>▪ Explain the retail industry in the RSA.</li> </ul>
2.2 Nature of retail business management (RBM1A)	<ul style="list-style-type: none"> <li>▪ Screening business opportunities in retail</li> <li>▪ Compile a profile for a retail business</li> <li>▪ Compile stakeholder profile and expectations for a retail strategy</li> <li>▪ Define the customer profile of a RB</li> <li>▪ Determine the best location for a RB.</li> <li>▪ Determine the stock and cash flow through a RB</li> <li>▪ Determine the nature of the business functions in a RB.</li> <li>▪ Determine the external environment of a RB</li> </ul>
2.3 Manage a retail operation (RBM1B)	<ul style="list-style-type: none"> <li>▪ Structure the organisation of a RB.</li> <li>▪ Compiling job descriptions</li> <li>▪ Compile the daily operational plan for a RB.</li> <li>▪ Compile a weekly operational plan for a RB</li> <li>▪ Compile a monthly operational plan for a RB</li> <li>▪ Compile an operational plan for an event RB</li> <li>▪ Schedule the staff of a RB for a week.</li> <li>▪ Plan and conduct a Retail event</li> <li>▪ Compile a plan to beat a retail competitor</li> </ul>
2.4 Housekeeping management (RBM1B)	<ul style="list-style-type: none"> <li>▪ An effective tactical housekeeping management system for a retail business that will ensure clear housekeeping objectives, policies, procedures, budgets, structures and control systems has been developed.</li> <li>▪ An effective operational housekeeping management system for a retail business has been developed that will ensure the right cleaning, garbage removal, safety, shrinkage, security, prevention and dealing with shoplifting, ergonomics, fire prevention and drills, urban unrest protection and dealing with natural disasters.</li> <li>▪ Effective asset specifications and asset register for a retail business have been compiled.</li> <li>▪ A maintenance programme for the assets of a retail business has been compiled that will ensure continuous operation and the most economical use of the assets.</li> </ul>
2.5 Labour Relations Act (RBM1B)	<ul style="list-style-type: none"> <li>▪ Define the role players in LR.</li> <li>▪ Define the objectives of the LR-act</li> <li>▪ Describe the freedom of association of staff in a RB</li> <li>▪ Describe the collective bargaining processes in RB</li> <li>▪ Describe strikes and lock-outs in a RB</li> <li>▪ Describe dispute resolution processes in a RB</li> <li>▪ Define unfair dismissals</li> </ul>

<b>3.1 BUSINESS MANAGEMENT 2 - FINANCE</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
3.1.1 Develop the capital acquisition structure for a small retail business.	<ul style="list-style-type: none"> <li>• A suitable equity and long term capital structure for a retail business have been compiled.</li> <li>• A suitable short term capital structure for a retail business has been compiled.</li> <li>• A relevant financial strategy for loans and / or overdraft facilities from the bank have been compiled.</li> </ul>
3.1.2 Manage the working capital of a small retail business	<ul style="list-style-type: none"> <li>• An effective debtors policy and procedure have been compiled.</li> <li>• An effective cash policy and procedure have been compiled.</li> <li>• An effective credit system and policy have been compiled.</li> <li>• An effective financial stock control policy and procedure have been compiled.</li> <li>• An effective short term investment policy and procedure have been compiled.</li> </ul>
3.1.3 Structure the employment of capital in fixed assets for a small retail business.	<ul style="list-style-type: none"> <li>• Record of the nature, volume and value of fixed assets of a retail business have correctly been compiled.</li> <li>• The long term investment policy and procedure for a retail business have effectively been compiled.</li> </ul>
3.1.4 Design administration systems for a small retail business.	<ul style="list-style-type: none"> <li>• An effective internal mail and communication system for the business have been compiled.</li> <li>• An effective external communication system (mail, fax, e-mail, internet, etc.) for the business has been compiled.</li> <li>• An effective documentation systems for the business has been developed</li> <li>• An effective computer software systems for the administration of a retail business has been specified.</li> </ul>

<b>3.2 BUSINESS MANAGEMENT 2 - PRODUCTION</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
3.2.1 Manage strategically the production in a retail business.	<ul style="list-style-type: none"> <li>• An appropriate strategic analysis for the production process in a retail business has been conducted.</li> <li>• An appropriate strategic production management programme has been compiled.</li> <li>• A suitable lay-out of the production facilities has been designed.</li> <li>• An effective quality control system (e.g. HACCP system) for a retail business has been developed.</li> <li>• A policy and procedure for the successful development of new products / services for a retail business has been compiled.</li> </ul>
3.2.2 Manage the annual tactical production functions of a retail business.	<ul style="list-style-type: none"> <li>• The annual objectives and budget for the production unit in a retail store have been compiled.</li> <li>• An annual schedule for the production process in a retail store has correctly been compiled.</li> <li>• A control system has been developed that will ensure the achievement of the production objectives for the year and correct implementation of the planned actions.</li> </ul>
3.2.3 Manage the day to day production in a retail business.	<ul style="list-style-type: none"> <li>• Effective daily/weekly objectives for the production unit in a retail store have been compiled.</li> <li>• Daily/weekly operation schedule for the production unit in a retail business have been compiled that will ensure the achievement of the production objectives.</li> <li>• Operational production problems have correctly been Identified and effectively been solved.</li> </ul>
3.2.4 Apply operational production management techniques in a retail business.	<ul style="list-style-type: none"> <li>• The production break-even points have accurately been calculated by using break-even analysis and sensitivity analysis techniques.</li> <li>• Work study / activity sampling have been accurately conducted to improve productivity.</li> <li>• Basic MRP1 and MRP2 have correctly been applied in a retail business.</li> <li>• Gantt and Pert have correctly been applied in a retail project.</li> <li>• A scientific decision on the allocation of resources has correctly been made based on basic linear programming.</li> </ul>



<b>4. RETAIL BUSINESS MANAGEMENT 2</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
4.1 Conduct <u>basic</u> marketing research for a retail business. (RBM2A)	<ul style="list-style-type: none"> <li>• A marketing research project has been planned correctly to ensure the right market information and the use of the correct research methods</li> <li>• Effective research has been conducted by doing the fieldwork and gathering of data.</li> <li>• Data has been correctly processed.</li> <li>• A report with feasible recommendations has been conducted.</li> </ul>
4.2 Lay-out and display the merchandise of a retail store. (RBM2A)	<ul style="list-style-type: none"> <li>• The correct nature, quantity, quality and time of products to be sold in a retail business have been specified.</li> <li>• A retail store has been laid out in accordance with all the requirements to utilise the available space, satisfy the needs of the customers and to maximise sales.</li> <li>• An clear operational management programme has been developed for the merchandising displays in the store that will ensure the right specifications for the personnel to build the displays.</li> <li>• A merchandise display has been build according to specifications.</li> </ul>
4.3 Advertise and promote products of a retail business. (RBM2B)	<ul style="list-style-type: none"> <li>• An appropriate operational advertising and sales promotion programme for a retail business has been planned.</li> <li>• The specifications for advertisements have been compiled to ensure the right production of the advertisements by a production house.</li> <li>• A draft advertisement has been produces according to specification.</li> <li>• A sales promotion project has been produced according to the promotion specifications that will ensure the generation of the required sales.</li> </ul>
4.4 Provide customer service. (RBM2B)	<ul style="list-style-type: none"> <li>• An effective customer service process has been developed that will contribute towards the loyalty and support of customers.</li> <li>• Customer's complaints have been resolved in such a way that they will still support the business.</li> </ul>
4.5 Price retail products and services. (RBM2B)	<ul style="list-style-type: none"> <li>• The basic selling price of a product or service has correctly been calculated.</li> <li>• Price strategies have been determined that will ensure the support of the customers.</li> </ul>

<b>5. BUSINESS MANAGEMENT 3</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
5.1 Manage the annual tactical operation of a retail business.	<ul style="list-style-type: none"> <li>• A business plan for a year/season that co-ordinate the objectives, policies, action plans and budgets of the business functions has been compiled.</li> <li>• An effective organisational structure for a retail business and all the functions that will ensure achievement of the annual objectives has been designed.</li> <li>• A suitable motivation system for the personnel that will enhance the performance of the personnel in all the functions in a retail business has been compiled.</li> <li>• Effective formal &amp; informal communication channels with personnel and relevant stakeholders have been created.</li> <li>• Control programmes have been developed that will ensure the achievement of the annual objectives.</li> </ul>
5.2 Manage the strategic marketing of a retail business on a basic level.	<ul style="list-style-type: none"> <li>• A basic strategic marketing programme has been developed for a retail business that will demonstrate knowledge of the strategic marketing direction of the business.</li> <li>• An appropriate strategic marketing structure for the marketing personnel and distribution channels of the business has been designed.</li> <li>• A basic strategic leadership programme for the marketing personnel has been developed that will ensure their support and motivation in achieving long term marketing objectives.</li> <li>• A basic strategic control systems has been designed that will ensure the achievement of the long term marketing objectives and the correct performance of strategic actions</li> </ul>
5.3 Manage the annual tactical marketing of a retail business.	<ul style="list-style-type: none"> <li>• An annual marketing plan for a retail business has been compiled that will ensure effective sales forecasting, marketing objectives, policies, strategies, action plans and marketing budgets.</li> <li>• An organisational structure and job descriptions for the marketing personnel has been designed to ensure the achievement of marketing objectives.</li> <li>• A leadership programme has been developed to ensure the utilisation and motivation of the marketing personnel in achieving marketing objectives for the year.</li> <li>• A tactical control system has been compiled which will ensure the achievement of the marketing objectives for the year and correct performance of the planned marketing actions.</li> </ul>
5.4 Manage the basic strategic aspects of the human resources function of a retail business.	<ul style="list-style-type: none"> <li>• An appropriate strategic human resources programme has been developed that will demonstrate knowledge of the strategic human resources function.</li> <li>• An appropriate equal opportunity policy and strategy have been developed for the retail business that will ensure compliance with the relevant labour acts.</li> <li>• A basic strategic personnel structure for the human resources function has been designed to ensure preparedness for future developments in the personnel field.</li> <li>• A basic strategic leadership programme for the personnel responsible for the human resources function has been developed to ensure their support and motivation in achieving the long term objectives in this field.</li> <li>• A basic strategic control system has been designed to ensure the achievement of long term human resources objectives and the correct implementation of strategic actions.</li> </ul>

SPECIFIES OUTCOMES	ASSESSMENT CRITERIA
5.5 Manage the annual tactical human resources functions of a retail business.	<ul style="list-style-type: none"> <li>• An appropriate annual human resources plan has been developed.</li> <li>• An organisational structure and job descriptions for the personnel responsible for the human resources function have been developed to ensure achievement of the annual personnel objectives.</li> <li>• An annual leadership programme has been developed to ensure the utilisation and motivation of the personnel in achieving the annual human resources objectives.</li> <li>• A control system has been designed that will ensure the achievement of the human resources objectives for the year and correct implementation of the planned personnel actions.</li> </ul>
5.6 Perform human resources management functions for a retail business.	<ul style="list-style-type: none"> <li>• Job descriptions for the positions in a retail business has been designed that will ensure optimum productivity from the person in the job.</li> <li>• Person specifications for the positions in a retail business has been drawn up that will ensure the placement of the best person in the job.</li> <li>• Jobs in a retail business has been fairly graded.</li> <li>• Remuneration and working conditions for the positions in retail business has been correctly determined.</li> <li>• The performance of the personnel has been objectively evaluated through an appraisal performance system.</li> </ul>
5.7 Recruit personnel for a retail business.	<ul style="list-style-type: none"> <li>• A personnel advertisement has been drawn up that will ensure the recruiting of the appropriate qualified persons for a vacancy.</li> <li>• A short list of the best applicants has been compiled whose CV's best fits the person specification for the position.</li> <li>• Recruitment interviews has effectively been conducted that will lead to the decision on the best applicant for the vacancy</li> <li>• The testing of applicants has been organised that will supply further relevant information about applicants that is needed to make a decision on the best candidate.</li> <li>• The right applicant that will be the best for a position has been selected.</li> <li>• A contract of employment has been compiled that will comply with all the legal requirements and that will protect the employer against misconduct by the employee.</li> <li>• The unsuccessful applicants have been corresponded with in such a way that will still maintain their dignity and the positive image of the employer.</li> <li>• An induction programme has been compiled for the successful applicant that will ensure the quickest productivity of the new employee.</li> </ul>
5.8 Train the personnel of a retail business.	<ul style="list-style-type: none"> <li>• The training needs of personnel that prevent them from fully utilising their potential has been identified.</li> <li>• A training programme has been developed that will eliminate any skills problems of the personnel.</li> <li>• An effective training programme has been developed.</li> <li>• A control system has been compiled for the training programmes that will ensure the efficiency of the training programmes.</li> </ul>
5.9 Develop a business plans for a retail business.	<ul style="list-style-type: none"> <li>• A detailed business plan has been compiled that integrates all the business functions that will ensure the success of a retail business.</li> </ul>

<b>6. RETAIL BUSINESS MANAGEMENT 3</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
6.1 Manage the strategic stock and logistics of a retail business on a basic level.	<ul style="list-style-type: none"> <li>• An appropriate strategic stock and logistics plan have been developed for a business that will demonstrate knowledge of the logistics function.</li> <li>• A valid strategic stock and logistics structure for the personnel involved in stock and for the supply chain of the business, has been designed.</li> <li>• A basic strategic leadership programme for the stock and logistics personnel has been developed to ensure their support and motivation in achieving the long term stock and logistics objectives.</li> <li>• Basic strategic control systems have been designed to ensure the achievement of long term stock objectives and the correct execution of strategic logistics actions.</li> </ul>
6.2 Manage the annual tactical stock and logistics functions of a retail business.	<ul style="list-style-type: none"> <li>• Stock and logistics of a retail business have been effectively planned for a year with effective stock and logistic objectives, policies, strategies, action plans and a logistics budget.</li> <li>• The logistic department's structure and job descriptions for the stock and logistics personnel have been effectively drafted to ensure the achievement of the logistics annual objectives.</li> <li>• An annual leadership programme has been developed that will ensure the utilisation and motivation of the stock and logistics personnel in achieving the logistics objectives for the year.</li> <li>• A control system has been designed which will ensure the achievement of the stock and logistics objectives for the year and correct execution of the planned actions.</li> </ul>
6.3 Buy products for a retail business.	<ul style="list-style-type: none"> <li>• A supplier specification policy has been compiled that will ensure the right supply of prescribed products at the required conditions.</li> <li>• A buying procedure and documentation system have been developed that will ensure the correct buying by the purchasing personnel.</li> <li>• A list of acceptable suppliers for the products of a retail store has been compiled.</li> <li>• Acceptable and profitable purchasing conditions for the business in a buying situation have been negotiated</li> <li>• A purchasing agreement has been drafted that will record the negotiated purchasing conditions.</li> <li>• A supplier development programme for the business has been developed that will ensure future supply of products.</li> <li>• A relationship programme with suppliers has been developed that will ensure a continuous supply of products to the business.</li> </ul>
6.4 Skills development programme	<ul style="list-style-type: none"> <li>• A strategic skills programme has been compiled that will ensure the future success of the learner.</li> <li>• An operational skill programme has been compiled that ensure the efficient skills development programme for the learner</li> <li>• A comprehensive skill audit to assess the skills of the learner regarding all the functions of a retail business has been compiled with evidence of all skills gained given.</li> <li>• A report of the learners workplace experience has been submitted by the employer in which the learners application of skills is assessed.</li> </ul>

<b>7. SHOPPING CENTRE MANAGEMENT</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
7.1 Manage a shopping centre.	<ul style="list-style-type: none"> <li>• The specifications of a suitable location for a shopping centre, that will ensure the buying of the right property, have been compiled.</li> <li>• Draft specifications for the layout of a shopping centre have been compiled for architects that will ensure the optimum utilisation of the space and customer satisfaction.</li> <li>• An ideal tenant profile for a shopping centre has been determined.</li> <li>• The ideal conditions that should be included in a lease agreement have been compiled.</li> <li>• A marketing strategy that will source the right kind and number of tenants for the shopping centre has been developed.</li> <li>• A marketing programme that will recruit the required patrons for the shopping centre has been compiled.</li> <li>• A housekeeping programme for the shopping centre that will ensure good security, safety, ergonomics and cleanness has been determined.</li> <li>• A long term maintenance refurbishment programme to ensure the economic usefulness of the shopping centre has been compiled.</li> <li>• Effective and relevant financial and administration procedures for the shopping centre have been determined.</li> <li>• A communication strategy with tenants that will enhance relationships has been developed.</li> </ul>
<b>8. CONSUMER BEHAVIOUR</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
8.1 Categorise the clients of a business into economically viable target groups	<ul style="list-style-type: none"> <li>• The customer profiles of the target groups has been correctly defined in terms of demographic, geographic and psycho-graphic factors as well as their buying and other behaviour so that the information can successfully be used for the marketing strategy of a retail business.</li> <li>• Product specifications for the different target groups have been compiled that will ensure the satisfaction of their needs.</li> </ul>
<b>9. PERSONAL SELLING</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
9.1 Sell products to customers.	<ul style="list-style-type: none"> <li>• Products have been successfully sold to customers who visit the retail store by applying all the steps of the sales process applicable to in-house retail selling.</li> <li>• Products have been successfully sold to potential customers outside a retail business by successfully applying the steps of field selling.</li> <li>• Difficult customers have been successfully dealt with.</li> <li>• Objections from customers have been successfully handled in such a way that the sales transactions were ensured.</li> <li>• A time schedule for the salespeople has been constructed that will ensure productivity and utilisation of their available time.</li> </ul>

<b>10. LOGISTICS 1</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
10.1 Control the stock of a retail business.	<ul style="list-style-type: none"> <li>• An effective stock control system has been designed.</li> <li>• The nature, quantity, time and quality of products to be bought have been correctly specified.</li> <li>• Stock from the prescribed supplier has been correctly ordered.</li> <li>• Stocks received have been correctly checked to ensure compliance with stock ordered and quality specifications.</li> <li>• An effective procedure and system for stock taking have been compiled.</li> <li>• Stock has been accurately counted.</li> <li>• Policies and procedures that will keep damage of stock and shrinkage at a minimum level have been compiled.</li> <li>• Technological equipment that will effectively control the stock of the business has been specified.</li> </ul>
10.2 Transport the products of a retail business.	<ul style="list-style-type: none"> <li>• The best possible way of transporting products from the supplier to the business has been determined.</li> <li>• The specifications for the best way to physically move the products through the business, has been compiled.</li> <li>• The specifications on how to store the stock in the warehouse in the most economical way and safe methods has been complied.</li> <li>• Stocks have been stored according to storage specifications.</li> <li>• The best possible way to physically move the product from the point of sale to the customers' homes has been determined.</li> </ul>
<b>11. LABOUR RELATIONS 2</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
11.1 Develop a labour relations system for a retail business and perform the relevant labour relations functions.	<ul style="list-style-type: none"> <li>• Work rules for a retail business have been compiled to ensure that all personnel know what they must and must not do.</li> <li>• A disciplinary policy and code have been developed for a retail business to ensure fair and consistent behaviour by the employer in cases of misconduct by personnel.</li> <li>• A grievance procedure has been designed for a retail business that will solve grievances as quickly as possible before they become too serious to handle.</li> <li>• A retrenchment procedure has been formulated for a retail business to ensure compliance to the relevant labour acts.</li> <li>• A recognition agreement has been drafted with a trade union that will ensure compliance to the labour acts and will form the basis for good relations with the trade union.</li> <li>• A strategy for negotiations with trade unions on conditions of work has been developed to ensure the best possible outcome for the employer during the negotiations.</li> <li>• A simulated meeting between shop stewards and management has been chaired to ensure compliance with and implementation of the agreed issues.</li> <li>• A disciplinary hearing has been held in compliance with the legal requirements and that will give fair treatment to personnel in cases of misconduct.</li> <li>• A strike plan has been designed that will minimise the risks for the employer during a strike.</li> <li>• An effective lock-out strategy has been compiled.</li> <li>• A work place democracy plan has been drawn up to be in compliance with the relevant labour acts and that will ensure higher productivity and efficiency by personnel..</li> </ul>

<b>12. FINANCIAL ACCOUNTING FOR RETAILERS</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
12.1 Apply an accounting system for a small retail business.	<ul style="list-style-type: none"> <li>• Transactions in the different accounting books of the business have correctly been recorded.</li> <li>• An income statement and balance sheet have correctly been drawn up.</li> <li>• The accounting software needs for the business have effectively been specified.</li> </ul>
12.2 Develop a financial information system for a small retail business.	<ul style="list-style-type: none"> <li>• Budgets for a retail business have accurately been compiled.</li> <li>• Cash flow budget for a retail business has accurately been drawn up.</li> <li>• Relevant financial reports based on the analysis have accurately been compiled.</li> <li>• The financial statements and cash flow statements have correctly been interpreted</li> <li>• The break-even point for a retail business has accurately been calculated.</li> <li>• The cost and sales price of a product has accurately been calculated.</li> </ul>
12.3 Prepare a bank reconciliation statement for a small retail business.	<ul style="list-style-type: none"> <li>• Cash receipts and cash payments journal have accurately been reconciled with the bank statement.</li> <li>• Differences between the bank statements and the cash journals have correctly been solved.</li> </ul>
12.4 Perform financial calculations.	<ul style="list-style-type: none"> <li>• The financial implications of discounts and shrinkage on the gross profit margins have correctly been calculated.</li> <li>• The effect of financial leverage on the business has accurately been measured.</li> <li>• The market share of a retail business has accurately been measured.</li> <li>• The effect of shoplifting on the gross profit margin of a retail business has correctly been calculated.</li> </ul>
<b>13. ENGLISH</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
13.1 Communications in a retail business environment.	<ul style="list-style-type: none"> <li>• Relevant operational communication and public relations functions for a retail business, that will ensure the required image with all the role players of a retail business, have effectively been performed e.g. planning of social functions, conducting interviews with the media, public speaking at meetings, writing media reports writing business reports, publications and internal newsletters.</li> </ul>

## B. B. TECH: RETAIL BUSINESS MANAGEMENT – OUTCOMES PER SUBJECT

<b>1. RETAIL BUSINESS MANAGEMENT 4</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
1.1 Market a retail business according to category management principles.	<ul style="list-style-type: none"> <li>• Categorise clients into viable target groups</li> <li>• Categorise products of a retail business correctly according to client categories.</li> <li>• Compile income statements with clear profit contributions for each category of the business.</li> <li>• Design an efficient layout for the business based on the categories of the business.</li> <li>• Develop an efficient merchandise mix for the categories of the business.</li> <li>• Develop an effective marketing communication strategy for the categories of the retail business.</li> <li>• Determine price strategies for the categories of the retail business that will ensure their support.</li> <li>• Develop efficient service strategies for the categories of the business.</li> </ul>
1.2 Structure the stock and logistic system of a retail business according to category management principles.	<ul style="list-style-type: none"> <li>• Compile an efficient network of suitable suppliers per category</li> <li>• Develop an efficient product movement and information system between supplier and the retail business per category</li> <li>• Compile efficient purchasing agreements with the suppliers of products per category.</li> <li>• Design efficient storage and stock control systems per category.</li> <li>• Where applicable, develop efficient delivery systems of the products to the clients per category.</li> </ul>
1.3 Structure the financial information system of a retail business according to category management principles.	<ul style="list-style-type: none"> <li>• Compile a budgeted income statement that will reflect the profit contribution per category.</li> <li>• Formulate clear and achievable financial objectives per category.</li> <li>• Develop efficient financial reports and information systems per category.</li> <li>• Design efficient financial control systems per category.</li> </ul>
1.4 Structure the management system of a retail business according to category management principles.	<ul style="list-style-type: none"> <li>• Design the management structure for the categories that will ensure the efficient implementation and management.</li> <li>• Define the correct responsibilities and authority for the management per category.</li> <li>• Develop efficient motivation systems per category.</li> </ul>
1.5 Apply formulas in a retail business.	<ul style="list-style-type: none"> <li>• Correctly define the nature and purpose of the most important formulas used in a retail business and correctly apply and interpret these formulas.</li> </ul>



SPECIFIES OUTCOMES	ASSESSMENT CRITERIA
1.6 Locate a retail business internationally.	<ul style="list-style-type: none"> <li>Defining the nature of the business that the learner wants to start and manage internationally.</li> <li>Compile a relevant set of criteria to evaluate alternative international locations for the chosen business</li> <li>Compile a list of possible alternative international locations that may fit the set of criteria.</li> <li>Decide on an efficient international location by analysing the alternative locations against the set of criteria.</li> </ul>
1.7 Position the retail business against the macro business environment of the foreign country where the learner plans to open the retail business.	<ul style="list-style-type: none"> <li>Define the macro environment of the retail business at the foreign location in terms of the country's, region's and city's :               <ul style="list-style-type: none"> <li>\$ Economy</li> <li>\$ Laws and regulations</li> <li>\$ Social environment</li> <li>\$ Physical environment</li> <li>\$ Technology</li> </ul> </li> <li>Define the industry environment of the retail business at the foreign location in terms of the business's:               <ul style="list-style-type: none"> <li>\$ Competition</li> <li>\$ Clients</li> <li>\$ Labour market</li> <li>\$ Industry</li> <li>\$ Physical location</li> <li>\$ Consumerism</li> </ul> </li> </ul>
1.8 Start and manage a retail business in a foreign country.	<ul style="list-style-type: none"> <li>Compile a business plan with strategies on how to open and manage the business at the new international location that will ensure the efficient implementation of the following strategies :               <ul style="list-style-type: none"> <li>\$ Marketing</li> <li>\$ Assets</li> <li>\$ Stock and Logistics</li> <li>\$ Human resources</li> <li>\$ Management</li> <li>\$ Finance</li> <li>\$ Administration</li> <li>\$ Image</li> <li>\$ Housekeeping</li> </ul> </li> <li>Compile an implementation plan that will ensure all the steps for starting such a business venture and the implementation of all the strategies.</li> </ul>
1.9 Report on a researched problem in the retail environment.	<ul style="list-style-type: none"> <li>Effectively gather, process, analyse and interpret the relevant information on a retail problem</li> <li>Correctly write and compile a research report according to the research methodology requirements.</li> <li>The theoretical relevance and the practical application of the research problem have been recorded.</li> <li>The conclusions and recommendations to the research problem have been clearly indicated.</li> <li>The relevant bibliography and appendices have been correctly compiled.</li> </ul>

<b>2. BUSINESS MANAGEMENT 4</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
2.1 Strategically plan a retail business.	<ul style="list-style-type: none"> <li>Effectively position the retail business against its strategic internal and external environment.</li> <li>Generate workable strategic alternatives strategies by using various strategic analysis techniques.</li> <li>Develop a clear and achievable vision and mission for a retail business.</li> <li>Formulate clear and attainable long term objectives and strategies for a retail business that will ensure the survival and/or success of the business.</li> </ul>
2.2 Strategically structure a retail business.	<ul style="list-style-type: none"> <li>Develop effective strategic structures for the retail business functions:               <ul style="list-style-type: none"> <li>\$ Overall business structure</li> <li>\$ Stock and Logistic structure</li> <li>\$ Project management structure</li> <li>\$ Human resources structure</li> <li>\$ Marketing structure</li> <li>\$ Administration structure</li> <li>\$ Production structure</li> <li>\$ Housekeeping and image structure</li> </ul> </li> </ul>
2.3 Lead a team of personnel towards achieving the long term objectives of a retail business.	<ul style="list-style-type: none"> <li>Determine the right leader and strategic team for the retail business that will ensure the success of this strategic programme.</li> <li>Formulate efficient strategic roles for senior management in the strategic management process.</li> <li>Determine strategic development programmes that will ensure the efficient development of the designated personnel of the retail business and compliance with the legal requirements.</li> <li>Develop efficient strategic motivation programmes for the personnel of a retail business</li> <li>Formulate an efficient strategic business culture for a retail business.</li> <li>Determine effective strategies to manage strategic changes in a retail business.</li> <li>Determine effective strategies to develop entrepreneurship and intrapreneurship in a retail business.</li> </ul>
2.4 Control the implementation of the strategic actions to ensure the achievement of the long term objectives	<ul style="list-style-type: none"> <li>Develop an efficient implementation system for the strategic actions of this programme.</li> <li>Develop an effective strategic information system</li> <li>Design a monitor control systems that will ensure the identification of any changes in any strategic assumption.</li> <li>Develop control systems that will ensure progress towards achieving the objectives.</li> <li>Design a control system that will ensure the correct strategic direction for the business.</li> </ul>

<b>3. ADVANCE FINANCE FOR MARKETERS (RETAILERS)</b>	
<b>SPECIFIES OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
3.1 Finance a retail business with long and short term finance.	<ul style="list-style-type: none"> <li>• Determine the long term financing structure of a retail business that will ensure efficient equity, long term debt and hybrid financing structures.</li> <li>• Determine the short term financing structure of a retail business that will ensure efficient creditors, short term loans and bank overdraft structures.</li> </ul>
3.2 Invest in assets of a retail business.	<ul style="list-style-type: none"> <li>• Structure effectively the asset portfolio of a retail business based on the correct calculations and analysis of:               <ul style="list-style-type: none"> <li>\$ Depreciation,</li> <li>\$ Maintenance cost,</li> <li>\$ Cost price,</li> <li>\$ Productivity,</li> <li>\$ Taxation,</li> <li>\$ Re-sell value</li> </ul> </li> </ul>
3.3 Plan and control the working capital of a retail business.	<ul style="list-style-type: none"> <li>• Develop an effective debtors planning and control system for the business.</li> <li>• Compile effective financial stock planning and control systems for the business.</li> <li>• Design an effective cash flow planning and control system.</li> <li>• Develop effective creditors planning and control systems for the business.</li> </ul>
3.4 Budget the income and costs of a retail business.	<ul style="list-style-type: none"> <li>• Effectively design, complete and interpret the annual and strategic budgeted income statement and the detailed budgets for:               <ul style="list-style-type: none"> <li>\$ Sales</li> <li>\$ Production and direct labour</li> <li>\$ Purchasing and direct material cost</li> <li>\$ Cost of sales</li> <li>\$ Marketing costs</li> <li>\$ Personnel costs</li> <li>\$ Financial costs</li> <li>\$ Administration costs</li> <li>\$ Public relation costs</li> <li>\$ Housekeeping and asset costs</li> </ul> </li> <li>• Compile an effective annual and strategic cash flow budget for a retail business.</li> <li>• Compile an accurate budgeted balance sheet for a retail business</li> </ul>
3.5 Costing in a retail business.	<ul style="list-style-type: none"> <li>• Effectively perform the following costing techniques in a retail business:               <ul style="list-style-type: none"> <li>\$ Sales variance analysis</li> <li>\$ Cost volume profit analysis</li> <li>\$ Break-even analysis</li> <li>\$ Marginal costing</li> </ul> </li> </ul>
3.6 Apply formulas in a retail business	<ul style="list-style-type: none"> <li>• Correctly define the nature and purpose of the most important formulas used in a retail business and correctly apply and interpret these formulas.</li> </ul>

4. RESEARCH METHODOLOGY	
SPECIFIES OUTCOMES	ASSESSMENT CRITERIA
4.1 Research and define a problem in the retail environment.	<ul style="list-style-type: none"> <li>• Write a research proposal on a problem in the retail environment that will effectively identify, demarcate and conceptualise an actual research problem in the retail business environment.</li> <li>• Conduct an extensive literature search that will ensure the full spectrum of secondary data within the knowledge field pertaining to the research problem.</li> <li>• Compile a working document in which the research objectives, main problems, sub problems and the hypotheses adopted regarding the problem is effectively conceptualised.</li> <li>• Compile a detailed plan that will solve the identified problem indicate the relevance, impact and plan of action in terms of all components and sub components of the standardised research proposal.</li> </ul>
4.2 Report on a researched problem in the retail environment.	<ul style="list-style-type: none"> <li>• Effectively gather, process, analyse and interpret the relevant information by               <ul style="list-style-type: none"> <li>\$ Designing a questionnaire suitable for conducting a survey research,</li> <li>\$ selecting and drawing a representative sample from a suitable sample frame,</li> <li>\$ gathering research data through the contact methods of personal telephonic, mail, and/or internet,</li> <li>\$ processing collected research information using a computerised statistical package, and</li> <li>\$ analysing and interpreting research data in terms of the research problem and solutions.</li> </ul> </li> <li>• Correctly write and compile the standard preliminaries of a research report such as abstracts, disclaimer, contents and acknowledgment</li> <li>• Write an effective introduction outlining the background and relevance of the problem investigated to the retail business environment</li> <li>• Indicate and describe effectively the theoretical relevance of the research problem to the knowledge field of retail business management by means of a literature study.</li> <li>• Indicate and describe effectively the practical relevance of the research problem to the retail business management knowledge field by means of a practical study in the retail environment.</li> <li>• Correctly describe the research study design and methodology adopted in the execution of the research survey.</li> <li>• Present and outline the research results in a structured manner and in accordance with the PEC-framework.</li> <li>• Present the conclusions and recommendations to the research problem clearly indicating an achieved solution (model) in the retail business field</li> <li>• Correctly compile the relevant bibliography and appendices.</li> </ul>

**ANNEXURE F:****New Qualifications****DIPLOMA IN RETAIL BUSINESS MANAGEMENT**

## CPUT Category B curriculum analysis & review

Template to be completed by academic department for internal approval of **undergraduate** qualifications<sup>1</sup>

Exit level outcomes of existing qualification	Exit level outcomes of revised HEQSF aligned qualification
<b>ELO 1 :</b> Undertake the general management of a retail business.	<b>ELO 1 :</b> Undertake the general management of a retail business with graduate attributes that ensure employable and responsible students, employees / employers and citizens who will act with integrity and honor in all engagements, be socially responsive to the social needs of society, innovative in their thinking and actions and be environmentally conscious.
<b>ELO 2 :</b> Manage the marketing of a retail business.	<b>ELO 2 :</b> Manage the marketing of a retail business.
<b>ELO 3 :</b> Manage the stock and logistics of a retail business.	<b>ELO 3 :</b> Manage the stock, supply chain and logistics of a retail business.
<b>ELO 4 :</b> Manage the human resources of a retail business.	<b>ELO 4 :</b> Manage the human resources of a retail business.
<b>ELO 5 :</b> Manage the finance and administration of a retail business	<b>ELO 5 :</b> Manage the finance and administration of a retail business
<b>ELO 6 :</b> Manage the production in a retail business.	<b>ELO 6 :</b> Manage the in-store production in a retail business.
	<b>ELO 7 :</b> Manage and conducting basic research on relevant problems in a retail business..

<sup>1</sup>

Consult the Higher Education Sub-Qualifications Framework (2013) for details on undergraduate qualification types

**New subjects:**

360	Diploma in Retail Business Management				
3 <sup>rd</sup> yr - 120	Retailing 3 (30)	Retail Operations Management 3 (30)	Retail Projects (24)	IR and Labour Law 1 (18)	Retail Research Techniques (18)
2 <sup>nd</sup> yr - 120	Retailing 2 (30)	Retail Operations Management 2 (30)	Retail Logistics (18)	Business Law 1 (24)	Retail Financial Management 2 (18)
1 <sup>st</sup> yr - 120	Retailing 1 (30)	Retail Operations Management 1 (30)	Business Computer Applications (18)	Communication 1 (18)	Retail Financial Management 1 (24)

## Section C: Subject structure, subject content & notional hours

Indicate the specific amendments to the design of the existing programme by describing what has been added, removed, modified or remains unchanged. The amendments indicated should clearly illustrate that the proposed curriculum changes do not differ from the original (existing) programme design by more than 50%. The information in this table must correspond with the information entered in **Section 2 of the HEQSF categorisation template** that accompanies this document.

Third order CESM category	HEMIS credit per subject	Level of study	Existing Subject names	New Subject names	Core (C) or Elective (E)	NQF level	SAQA credits <sup>2</sup>	Provide a short description of revised subject content	Indicate which subjects of the existing qualification will be: removed, amended or will remain unchanged in the re-design of the programme.
<b>EXISTING</b>									
041503	0.167	1	Retail Business Management 1		C	5	20		
<b>NEW</b>									
041503	0.25	1		Retailing 1	C	5	30	<ul style="list-style-type: none"> <li>• Nature of retail</li> <li>• Nature of the retail industry</li> <li>• Types of retail businesses</li> <li>• Supply chain and stock flow</li> <li>• Money flow</li> <li>• Segmenting customers</li> <li>• Customer shopping behaviour</li> <li>• Customer research</li> <li>• Retail marketing process</li> <li>• Retail selling</li> <li>• Sales management</li> <li>• Customer and Point of sale service</li> </ul>	<ul style="list-style-type: none"> <li>• The name changed to focus on the primary retail cycle.</li> <li>• Adding of customer shopping behaviour and retail selling.</li> </ul>

<sup>2</sup>

1 SAQA credit = 10 notional hours



EXISTING									
040101	0.167	1	Business Management 1		C	5	20		
NEW									
041503	0.25	1		Retail Operations Management 1	C	5	30	<ul style="list-style-type: none"> <li>• Nature of a retail business management</li> <li>• Principles of management in retail</li> <li>• Health, safety &amp; housekeeping management</li> <li>• Managing Stakeholder relations</li> <li>• Basic business plan</li> <li>• Principles of shrinkage &amp; loss control</li> <li>• Principles of asset management and maintenance</li> <li>• Principles of risk management</li> <li>• Principles of operations management in a retail chain store</li> <li>• Leadership</li> <li>• Concepts and principles of self-management</li> <li>• Legal and statutory requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Name changed to focus on the management of a retail operation rather than general business management.</li> <li>• Some content moved from Retail Business Management 1 to eliminate duplication and to centralise all the retail operational management topics in one stream.</li> </ul>

EXISTING									
060301	0.167	1	End User Computing		C	5	20		
NEW									
060301	0.15	1		Business Computer Applications	C	5	18	<p><i>1. Understand and be able to use the different components of Communication and Information Technology</i></p> <p><i>2. Understand and be able to use the Desktop Environment within the current Operating system.</i></p> <p><i>3. Be able to use communication and research technologies in world wide web environment on desktop and mobile technology.</i></p> <p><i>4. Able to use the Microsoft Office Applications individually and integrate within applications.</i></p>	Name changed to standardise in the Faculty of Business. The content remains the same as before. The objective of the subject is to prepare the students for the opportunities, challenges and issues regarding learning in an increasingly digital, open and mobile business world. Students learn about, and apply rapidly advancing technologies within a business environment.
EXISTING									
04021	0.166	1	Financial Accounting 1		C	5	20		
NEW									
04021	0.20	1		Retail	C	5	24	<ul style="list-style-type: none"> <li>Financial accounting principles</li> </ul>	The name changed

				<b>Financial Management 1</b>				<ul style="list-style-type: none"> <li>Financial statements of retailers</li> <li>Financial calculations</li> <li>Financial management principles</li> <li>Costing principles</li> <li>Concepts and principles of cash handling management in a retail business</li> <li>Operational management of Debtors</li> </ul>	<p>as the core focuses of the content on financial management applicable to retailers.</p> <p>Retail manager does not do the financial accounting of a business but all the financial activities needed.</p>
<b>EXISTING</b>									
040301	0.167	1	<b>English Communication</b>		C	5	20		
<b>NEW</b>									
040301	0.15	1		<b>Communication 1</b>	C	5	18	<ul style="list-style-type: none"> <li>Demonstrate an understanding of the principles of effective interpersonal communication</li> <li>Use different written forms of interpersonal and workplace communication effectively</li> <li>Use oral communication clearly and concisely in a variety of personal and professional situations</li> </ul>	<p>Name changed to standardise in the Faculty of Business. but all content remains the same.</p>



040101	0.2	2	<b>Business Management 2</b>		C	6	24		
<b>NEW</b>									
041503	0.25	2		<b>Retail Operations Management 2</b>	C	6	30	<ul style="list-style-type: none"> <li>• Production process (in store)</li> <li>• Value creation and productivity</li> <li>• Process types – Manufacturing and Service</li> <li>• Product/process matrix</li> <li>• Service/process matrix</li> <li>• Value drivers</li> <li>• Process management</li> <li>• Capacity management</li> <li>• Types of forecasting – Quantitative &amp; Qualitative</li> <li>• Service management</li> <li>• Quality Management &amp; Standards (ISO, HACCP, SABS)</li> <li>• HR administration</li> <li>• HR management activities relevant to a manager of a retail business.</li> </ul>	The Name changed with the content of operations management remaining the same. The topic of HR administration and management has moved from Business Management 3 to Retail Operations Management 2 because operational HR issues should be dealt with at a lower level i.e. 2 <sup>nd</sup> year and not in the 3 <sup>rd</sup> year of study.
<b>EXISTING</b>									
040103	0.20	2	<b>Logistics 2</b>		C	5	24		
<b>NEW</b>									
040103	0.15	2		<b>Retail Logistics</b>	C	5	18	<ul style="list-style-type: none"> <li>• Manage stock levels</li> <li>• Manage stock counts</li> <li>• Ordering of stock</li> <li>• Manage receiving of stock</li> <li>• Manage stock movement and handling</li> <li>• Manage stock in stockroom /</li> </ul>	The Name changed in order to differentiate between retail and other logistics. The content remains the same.

								<div>warehouse</div> <div><ul style="list-style-type: none"><li>• Principles of logistics and supply chain management</li><li>• Logistics and supply chain acts - Packaging act, Stacking and transport of products</li><li>• The nature and principles of stock management</li></ul></div>	
EXISTING									
			Does not exist						
NEW									
120301	0.20	2		Business Law 1	C	5	24	<div><ul style="list-style-type: none"><li>○ <i>The requirements for a valid contract, intention, consensus, contractual capacity, lawfulness, formalities and possibility of performance.</i></li><li>▪ <i>the general content and interpretation of a contract</i></li><li>▪ <i>breach of contract, remedies and termination</i></li><li>• <i>specific commercial contracts include, but are not limited to, contracts of sale and lease, credit agreements, agency, surety and other forms of security, insurance and partnership agreements</i></li><li>▪ <i>the effect of relevant provisions of, for example, the Consumer Protection Act</i></li><li>• <i>on the rights and obligations of the parties to the contract.</i></li></ul></div>	This new subject provides an introduction to business law. The focus is on ensuring that students gain a fundamental understanding of the regulatory framework that governs the commercial activities in a Retail Business. Previously, the introduction to business law was done in Retail Business Management 1. It

									was decided that for the newly revised qualification, Business Law would be a stand alone subject.
<b>EXISTING</b>									
040101	0.20	2	<b>Business Management 2</b>		C	6	20	<ul style="list-style-type: none"> <li>Financial Management was one of the modules of Business Management 2.</li> </ul>	
<b>NEW</b>									
040101	0.15	2		<b>Retail Financial Management 2</b>	C	6	18	<ul style="list-style-type: none"> <li>Financial management framework and principles</li> <li>Retailer financial statements</li> <li>Financial Analysis, Planning and control</li> <li>The Financing Decision Fundamentals</li> <li>The Investment decision</li> <li>Working Capital Management in a retail environment</li> <li>Fundamental Management accounting concepts</li> <li>Sales variance analysis</li> </ul>	It is now a separate subject with a new name. The content in the financial management course is now being offered for a full year instead of 6 months. More detail is included on financing decisions, investment decisions and working capital management for retail.

EXISTING									
040101	0.33	3	Business Management 3		C	6	40		
NEW									
041503	0.25	3		Retail Operations Management 3	C	6	30	<ul style="list-style-type: none"> <li>Environment factors impacting on a retail business: (focus on)               <ul style="list-style-type: none"> <li>Basic economics relevant to a retail business</li> <li>Legal environment (BBBEE, EE, Legal system)</li> </ul> </li> <li>Types of management ( focus on):               <ul style="list-style-type: none"> <li>Basic strategic management</li> <li>Tactical management</li> <li>Leadership –Situational / Different between leadership and management)</li> </ul> </li> <li>Basic Strategic Management (focus on)               <ul style="list-style-type: none"> <li>Marketing Management</li> <li>HR Marketing</li> </ul> </li> <li>Tactical Management (focus on):               <ul style="list-style-type: none"> <li>Marketing management</li> <li>HR management</li> <li>Operational HR</li> </ul> </li> <li>Business plan</li> </ul>	The name changed with slight content changes by undertaking a more integrated role of all the functions through strategic management, tactical management and leadership. Human Resource operational activities are moved to Retail Operations Management 2 because operational HR issues should be dealt with at a lower level i.e. 2 <sup>nd</sup> year not 3 <sup>rd</sup> year of study.



EXISTING									
041503	0.333	3	Retail Business Management 3		C	6	40		
NEW									
041502	0.25	3		Retailing 3	C	6	30	<ul style="list-style-type: none"> <li>• Buying process and activities to ensure the right products for a retail business.</li> <li>• Manage the strategic buying, stock and logistics of a retail business on a basic level.</li> <li>• Manage the annual tactical stock and logistics functions of a retail business.</li> <li>• Planning function by corporate retail buyers for a range of products to be distributed to branches and to be supported by a marketing programme.</li> </ul>	The name has changed but the content remains the same with the inclusion of the planning function of buyers, because of a request from the retail industry.
EXISTING									
041503	0.167	3	Shopping Centre Management 1		C	6	20		
NEW									
041503	0.20	3		Retail Projects	C	6	24	<ul style="list-style-type: none"> <li>• Management of projects in retail businesses..</li> <li>• Buying and renting of retail properties.</li> </ul>	A new subject with the emphasis now on project management application in the retail environment. Shopping centre management is

								<ul style="list-style-type: none"> <li><b>Projects with Shopping Centre Management.</b></li> </ul>	now included as a module within this subject. Retailing 2 and ROM 2 form the basic underpinning knowledge.
<b>EXISTING</b>									
120311	0.33	2	<b>Industrial Relations 2</b>		C	6	40		
<b>NEW</b>									
120311	0.15	3		<b>Industrial Relations and Labour Law 1</b>	C	5	18	<p>Core content: The content of this subject includes, among others ...</p> <ul style="list-style-type: none"> <li>○ introduction to organisational dynamics and the role players in the employment relationship recruitment and the facilitation of the employment relationship.</li> <li>○ all legislation relevant to the employment relationship including, but not limited to, the Labour Relations Act, Basic Conditions of Employment Act, Employment Equity Act, Skills Development Act, Occupational Health and Safety Act and relevant sectoral determinations</li> </ul>	<p>The subject content is the same as Industrial Relations 2 but now includes more Labour law issues to be dealt with in the workplace.</p> <p>The new subject Business Law provides the underpinning knowledge of law. The additional issues on labour related matters ensures that all law related aspects are fully covered in the retail diploma.</p>

EXISTING									
			Does not exist						
NEW									
041599	0.15	3		Retail Research Techniques	C	6	18	<ul style="list-style-type: none"> <li>The purpose and types of basic research that is applied by managers in a retail business - focusing mainly on:               <ul style="list-style-type: none"> <li>Focus groups</li> <li>Observation</li> <li>Basic surveys</li> <li>Individual interviews</li> </ul> </li> <li>Identifying and formulating of researchable problems by managers in a retail business.</li> <li>Planning of the basic research</li> <li>Conducting of the basic research</li> <li>Presentation of research outcomes to stakeholders</li> </ul>	<p>This is a new subject introduced to prepare the student to manage and to conduct basic research on problems in any of the functions of a retail business.</p> <p>It also prepares the learner on research practices for the higher level research in the Advanced Diploma.</p>

