**Assessment 2: Project 1 – Develop workplace relationship processes**

**Assessment task description**

* This is the second (2nd) of the four assessment tasks you must successfully complete to be deemed competent in this unit of competency.
* In this assessment, you must identify collaboration processes, and develop consultation and conflict management processes for a team.
* You must attempt all criteria to the required level, e.g., assessment criteria mentioned in the performance checklist to be deemed satisfactory in this task.
* You must complete this task by following all given instructions, for the trainer/assessor to assess competency in this assessment task.

**Applicable conditions**

* You may complete this project in your own time and submit it within one week from module end date.
* You must complete the task independently.
* You can refer to the textbook, learning materials or your research of external resources in completing this task.
* The Trainer/Assessor may ask you relevant questions on this assessment task to ensure that this is your own work, or to confirm your knowledge to close any gaps they may identify as not evidenced in your written responses.
* The Trainer /Assessor will assess your practical skills, technique and knowledge as you complete this assessment task.
* All criteria listed in the performance checklists guide must be completed satisfactorily to the standard described.
* No marks or grades are allocated for this assessment task. The outcome of the task will be Satisfactory or Not Satisfactory.
* You must express all answers/responses in your own words or acknowledge the sources of reference materials used where necessary.

**Resource requirements**

You will need the following materials/ resources for this task:

* Textbook/ Online learning resources
* Computer with Internet access for research purposes and word processing

**Scenario**

The Gift Box is growing business that sells gift products. Over the two years of operations, they have received commercial success and positive reception. They have an increasing number of suppliers of different products from all over the world. At the same time, they have been getting requests from customers for varied products to be included in their catalogues.

In the post COVID-19 world, where digital and e-commerce is a lifeline for consumers, retailers and employees, and core to retail’s survival, larger retail brands and chains have collapsed due to high overhead and staffing costs.

This has made room for smaller innovative brands to grow in the retail landscape.

However, to ensure their survival, even smallerbusinesses must fast-track digital transformation by investing in Omni-channel experiences (offering different methods of shopping e.g. online, in a physical shop, or by phone).

Here is an extract from the Gift Box Operational Plan 202X – 202Y.

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| --- | --- | --- | --- | --- |
| **Extract of The Gift Box Operational Plan 202X – 202Y**  **Summary**  The Gift Box is a company based in Melbourne that sells unique and innovative gift products, which are sourced from all over the world, and brought to the customers at affordable prices.  The company was established in 2018 by Mary Delaney, who is involved in the operation and management of the company. Mary has extensive experience in the retail industry.  **Values championed by The Gift Box**  At The Gift Box, we will always endeavour to:   * value and respect our customers * care for and support our team * uphold our commitment to the environment * ensure innovation, integrity and excellence in all areas   **Goals**   * The first goal is to reach new customers whom we may not have been able to serve earlier due to geographical or cost factors. * The second goal is to reduce the costs passed on to customers, and increase the value offered to customers. Digital retail will enable this as aspects of the consumer experience, such as discovery, evaluation and support, are much more cost effective and faster online than in traditional retail mechanisms. * The third goal is to capture market share by creating a unique customer experience that allows the customer to quickly:   + find the best solution for their needs   + make a purchase   + get information and answers to their questions   **Background**  The Gift Box Organisational Chart  https://gen-sandbox.s3-ap-southeast-2.amazonaws.com/Gallery/3a065732-7648-464c-b4d1-92c1f564fd04.PNG    The COVID-19 crisis affected the majority of businesses in the Australian retail sector, reducing demand for goods and services, and affecting sales and cash flow.  At the start of COVID-19, many retail businesses reduced staff hours, or even laid off a significant percentage of their staff.  The Gift Box also had drastically reduced sales during these times, but the company survived as the Australian Government’s Job Keeper payments scheme provided a lifeline, allowing employers to retain staff and bounce back from the COVID-19 crisis.  In the post COVID-19 world, the retail sector will be faced with a very different customer. This new-world customer will be more comfortable with online transactions, have fewer real-life interactions, and be trained to constantly sanitise in public spaces.  Eventually this may change, but some of these behaviours, habits, and trends will persist. The physical store will be forced to change into a supporting role in an online shopping and delivery system. Savvy mobile shoppers will expect faster, more convenient, and smarter transactions.  Therefore, The Gift Box’s objectives for the next two years are to:   * add e-commerce capabilities to existing company website in the first year * introduce a mobile app that customers can use to short list and make purchases, in the second year * be known as an ethical company that promotes sustainability, by the end of year two * establish an annual growth rate of approximately 20% in year two   **Operational Priorities for Quarter 1, FY202Y**   |  |  | | --- | --- | | **Key result area** | **Key performance indicator** | | Implement e-commerce capabilities to existing company website before Christmas 202X. | E-commerce platform is fully (100%) functional by October 202X in time for the Christmas high season. |   In order to meet this goal of implementing the e-commerce model, the company will need specific human and other resources to handle digital marketing, product page design, shipping and handling, online customer service etiquette, price points, social outreach, ad campaigns, and much more.  The current staff have general retail knowledge and experience, but that will not be sufficient to make them successful at e-commerce. The staff will need to be trained in e-commerce and all the tasks that need to be performed as part the e-commerce operations.  The Gift Box will aim to reduce layoffs and redundancies as far as possible by providing training, and opportunities to take up the new challenges, to current team members.  Training existing staff to perform roles in the new business model, will be cost effective, as these staff can have a seamless transition period, where they can continue to perform their existing roles, while supporting in setting up the new business model and at the same time, learning skills for their new work roles.  Staff will need training in E-commerce activities, such as digital marketing, product page design, shipping and handling, online customer service etiquette, price points, social outreach, ad campaigns, etc. |

The Gift Box has set up a new online store, and a new staff team dedicated to the online store. This team is made up of existing staff of the company, who are in two separate locations – the head office and the warehouse.

***You are the new Online Store Manager*** at The Gift Box store. In addition to you, there are five members in the newly formed online store team. They include an accounts officer, a customer service representative, an inventory manager, on order processor, and an IT support officer.

The following is a description of staff in the online store team, including their roles and responsibilities.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Job/Title** | **Highest level qualification attained** | **Position description** | **Workplace relationships** | **Location** |
| You | Online Store Manager | Diploma of Retail Leadership | * Ensure website content, user experience, inventory, product information, pricing and promotions, are up to date and reflect company policies. * Implement and streamline internal systems for all aspects of online products, sales and customer engagement * Plan and execute digital marketing campaigns | * Collaboration with all members of the online team | Head office |
| Ming Wei | Accounts Officer | Diploma of Accounting | * Bookkeeping * Preparing and issuing client invoices * Making journal entries * Managing accounts receivable and payable | * Online Store Manager * Customer Service Representative * Inventory Manager | Head office |
| Jenny Day | Customer Service Representative | Certificate IV in Retail Management | * Manage website and social media customer interaction * Promote products and services on social media * Answer phone calls and queries via email and social media * Respond to customer complaints and escalate issues to relevant personnel * Work as a team with others to ensure customer orders and queries are fulfilled | * Online Store Manager * Accounts Officer * Online Order Processor * IT Support Officer | Head office |
| Samantha Davey | Inventory manager | Certificate IV in Warehousing Operations | * Maintain receipts, records, and withdrawals of the stockroom * Receive, unload, and shelve supplies * Inspect deliveries for damage or discrepancies * Confirm proper stock levels and maintain inventory control * Coordinate the movement of equipment, and necessary minor repairs | * Online Store Manager * Accounts Officer * Online Order Processor | Warehouse |
| Dylan Knight | Order Processor | Certificate II in Warehousing Operations | * Receive and process orders * Package orders for dispatch * Receive, unload, and shelve supplies * Assist store keeper in checking stock levels | * Inventory Manager * Customer Service Representative | Warehouse |
| Fawad Khan | IT Support Officer | * Diploma of IT      * Diploma of Website Development | * Trouble shooting IT issues for team members * Responsible for data storage, back up and security. * Maintaining customer databases and records | * Online Store Manager * Customer Service Representative | Head office |

**Team meeting and reporting schedule:**

According to organisational policy, the Online Store team will follow the meeting and reporting schedule given below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Meeting/ report type** | **Purpose** | **Frequency** | **Attendees** | **Location** |
| Sales and customer service briefing | Identify sales trends and targets, inventory supply, and website maintenance or update needs. | Weekly | * Online Store Manager * Customer Service Representative * Inventory Manager * IT Support Officer | Head office in-person/ online |
| Accounts meeting | Identify financial performance of department, accounts payable and receivable status, and financial targets. | Weekly | * Online Store Manager * Accounts Officer | Head office in-person/ online |
| Inventory and dispatch control meeting | Stock reports, and workflow and equipment check | Weekly | * Inventory Manager * Online Order Processor | Warehouse in-person |
| Order and customer complaint management reports | Report and address customer queries, complaints, track order completion rates, address website issues using an online ticket-based task management system | Daily | * Online Store Manager * Customer Service Representative * Inventory Manager * IT Support Officer * Online Order Processor | Online ticket-based task management system |
| Troubleshooting or general meetings | Escalate issues, or plan special projects and promotions | As needed | Online Store Manager and all staff | Head office in-person / warehouse in-person / online |

**The Gift Box’s standards of performance**

Apart from training and coaching to implement the e-commerce platform, the CEO wants all staff to be trained and their performance to be monitored for the following standards of performance:

* Adherence to procedures
* Completion of all documentation
* Cost minimisation
* Customer service standards
* Productivity
* Punctuality
* Team interaction

**Code of conduct**

The following are the basic requirements of the company’s code of conduct:

* Be punctual
* Meet WHS obligations
* Follow ethical practices
* Maintain confidentiality and privacy
* Comply with anti-discrimination legislation
* Use appropriate language
* Follow correct dress code.

The CEO has asked you to review and develop processes to enable effective workplace relationships in the online store team.

**Part A – Develop consultation and conflict management processes**

You are the new Online Store Manager at The Gift Box store. You have been given the task of developing consultation and conflict management processes for the new online store team, based on the collaboration and meeting requirements of the team.

You must:

1. Review the organisational information about team given in the scenario, and identify two examples each of the following types of collaboration:

* Synchronous collaboration –
* Asynchronous collaboration –
* Cloud-collaboration –

    2. Identify and briefly describe the following:

            a. four organisational policies, procedures and codes that are applicable to effective workplace collaboration, and

             b. two related legislative or regulatory requirements, standards and codes to the four selected policies procedures and codes

    3. Develop a consultation process for the online team, so that employees can raise issues related to their work role. In your consultation process you must identify ***at least three*** strategies to facilitate consultation with employees.

The consultation process must include:

* Purpose
* Methods of communication for consultation
* Team meetings and frequency
* Team leader responsibilities
* Team member responsibilities
* Situations when consultation may be required
* Methods for management to effectively consult employees
* Strategies for acknowledgement of employee feedback by management
* Strategies for monitoring the effectiveness of the consultation process
* Related legislation and policies

Use the points above as sub-headings for your process document.

     4. Develop a dispute resolution which ensures that issues raised are resolved promptly or escalated referred to relevant personnel. Your process must include:

* Purpose
* Team leader responsibilities
* Team member responsibilities
* Dispute resolution procedure
* Escalation process
* Relevant legislation and policies

Use the points above as sub-headings for your process document.

**Submission requirements**

At the end of this task, you must submit the following to your assessor:

* Workplace Consultation Process
* Dispute Resolution Process