

Client Challenge

A world-leading specialty jewelry retailer with hundreds of stores across North America faced growing challenges managing field execution due to poor coordination of store-facing activities. With no centralized process for annual workload planning, departments launched initiatives independently, often overloading stores during peak sales periods or creating conflicting task demands. Store tasks were scheduled without considering labor budgets or communication lead times, resulting in missed deadlines, inefficient execution, and increased field frustration. The retailer recognized that without a structured planning and intake process, store teams would continue to be overwhelmed, execution would falter, and strategic priorities would be compromised.

Parker Avery Solution

The Parker Avery Group partnered with the client to design a comprehensive workload planning and retail task management framework for its North America stores. Key components of the solution included:

- Annual planning calendar aligned to payroll
- Workload balancing and task budgeting tools
- Intake forms and task approval workflows
- Greyout/blackout week governance
- Weekly cross-functional workload council
- Standard templates and process guides
- Organizational change tools for partners and store operations teams

Key project outcomes included:

- Alignment of field tasks with payroll funding
- Defined approval process for last-minute requests
- Improved cross-functional coordination and project prioritization
- Consistent workload distribution across weeks and store types
- Reduction in last-minute task entries and communications
- Stronger field execution and reduced store stress

RESULTS



RETAIL TASK
MANAGEMENT
FRAMEWORK
ESTABLISHED



STRATEGIC
PROJECTS ALIGNED
WITH STORE
PAYROLL



VISIBILITY,
ACCOUNTABILITY, AND
STORE EXECUTION
IMPROVED

By establishing a structured retail task management process, the client significantly improved store execution and operational alignment. The solution enables the client to evaluate all store-facing work against selling hours and resource constraints, enabling consistent staffing, fewer disruptions, and better prioritization of strategic initiatives. The new governance model empowers the store operations team to manage their workload throughout the year proactively, serve as gatekeepers to the field, and align project timing with payroll budgets.

The client now has a scalable foundation to deploy the model worldwide, ultimately guaranteeing visibility, accountability, and execution excellence across markets.