RASCI
Retailers Association's
Skill Council of India

Participant Handbook

Sector
Retail

Sub-Sector
Retail E-commerce;
Retail Operations

Occupation
Sales Operations; Store Operations

Reference ID: **RAS/Q0303, Version 2.0**
NSQF level 3

Retail Order Fulfilment Assistant

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> development then Skill Development
> should be our mission. "

Shri Narendra Modi
Prime Minister of India

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SKILLING CONTENT: PARTICIPANT HANDBOOK

Complying to National Occupational Standards of
Job Role/ Qualification Pack: **'Retail Order Fulfilment Assistant'** QP No. **'RAS/Q0303, NSQF Level 3'**

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Acknowledgements

About this book

Welcome to the "Retail Order Fulfilment Assistant" training programme. This PHB intends to facilitate the participants with detailed knowledge of the concept of the Retail industry, the occupation and the role of the Retail Order Fulfilment Assistant, and their functioning.

This Participant Handbook has been designed based on the Qualification Pack (QP) under the National Skill Qualification Framework (NSQF), and it comprises the following National Occupational Standards (NOS)/ topics as well as additional topics.

Compulsory NOS:

1. RAS/N0101: To receive and store goods in retail operations
2. RAS/N0102: To deliver products to customers
3. RAS/N0112: To process customer orders for goods
4. RAS/N0116: To process cash and credit transactions
5. RAS/N0124: To provide information and advice to customers
6. RAS/N0117: To process returned goods
7. RAS/N0121-v2: To maintain health and safety
8. RAS/N0137: To work effectively in a retail team
9. RAS/N0138: To work effectively in an organization
10. DGT/VSQ/N0102: Employability Skills

Symbols Used

Key Learning Outcomes	Unit Objectives	Exercise	Tips	Notes	Activity	Summary

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Employability Skills is available at the following location :

https://www.skillindiadigital.gov.in/content/list

Scan the QR code below to access the ebook

1. Introduction

Additional Reading

Key Learning Outcomes 💡

By the end of this module, the participants will be able to:

1. Describe the job role of a Retail Order Fulfilment Assistant.
2. List the objectives for studying the role of the Retail Order Fulfilment Assistant.
3. Explain the importance of backend operations in fulfilling all responsibilities of the Retail Order Fulfilment Assistant.
4. Describe the career progression of a Retail Order Fulfilment Assistant

UNIT 1.1: Introduction and Ice Breaker

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Explain the basic definition of Retail Order Fulfilment Assistant
2. Describe the roles and responsibilities of the Retail Order Fulfilment Assistant by performing the activity

1.1.1 Introduction

The Retail Order Fulfilment Assistant is defined as the person who is supposed to provide all services at the retail store. The Retail Order Fulfilment Assistant is primarily indulged in sales-related operations. He/she is directly responsible for the sales operations of a retail store.

He/she comprehensively deals with all the functions of service fulfilment in retail operations which are given below:

Receive and store goods in the retail store

Displaying and shelving goods for customer access

Selling goods to the customers

Accepting payments from the customers

Responding politely to the customers' queries, whenever they arise

Assist the customers when they browse while shopping

Delivering goods to the customers' location

Fig. 1.1.1: functions of retail operation

The Retail Order Fulfilment Assistants provide all services singlehandedly. This is why he/she needs to become an individual with diversified skills so that he/she can perform multiple roles together.

Let's take the examples to understand the meaning of Retail Order Fulfilment Assistant in detail.

Think of a situation when you visit the grocery shop to purchase groceries like rice, pulses, flour, refined flour, etc. When you visit a store, then you ask a person to provide the goods that you want. That person helps you to get the required goods in the required quantities. After providing the goods, he/she generates an invoice and accepts payments. Afterward, he/she also loads the goods in your vehicle or carriage that you bring with you for taking goods to your place.

That person is generally called a "Retail Order Fulfilment Assistant".

Ice-breaker activity

All participants of the class will visit any outlet where they can and notice the behaviour and skills of the person who attends them and assists them in purchasing the products. All participants will list down the skills and behavioural patterns that they notice in those executives. Let's see how many participants would have noticed the same skills and behavioural patterns.

Activity

Visit a nearby retail store and note all activities that the Retail Order Fulfilment Assistants in the retail store are performing each day.

UNIT 1.2: Objective Settings

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Explain the basic objectives attached to the study of Retail Order Fulfilment Assistant program

1.2.1 Objective of Retail Order Fulfilment Assistant Program

The objectives of the Retail Order Fulfilment Assistant program –

1. To provide guidance to the learner about the basic roles and responsibilities of the Retail Order Fulfilment Assistant.
2. To provide understanding related to the workflow of Retail Order Fulfilment Assistant ranging from picking goods' deliveries from the traders to clarifying the customers' queries after goods' delivery.
3. To give the basic understanding of skills and qualifications that the distributor salesman must have to carry out the desired sales operations.

UNIT 1.3: Overview of the Role of Retail Order Fulfilment Assistant

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the meaning of service.
2. State the services that are provided by the Retail Order Fulfilment Assistant.

1.3.1 Role of Retail Order Fulfilment Assistant

We have understood that the Retail Order Fulfilment Assistant provides all services. Before going forward, let's understand the meaning of service first.

Service is defined as an intangible product, or an action associated with the product sales that can be felt only. For example, when an individual sells the products, then the efforts which he/she puts into making the sale are generally called the service.

The Retail Order Fulfilment Assistant predominantly offers the services to the customers at the time of product sales or after-sales services. He/she offers services inside or outside of the store. Let's understand how they offer both types of services with the help of an example.

A customer named Arvind visits the retail store named XYZ. XYZ store deals in the consumer electronics domain. Arvind wishes to purchase a washing machine. Arvind is entertained by the Retail Order Fulfilment Assistant named Brij. Brij displays all varieties of washing machines to Arvind in terms of different brands, loads, and weights. All efforts of Brij ranging from displaying the products to the payment receipts from the customer are the services that Brij provides inside the store.

There are other services like the installation of the washing machine at the customer's house is the after-sale service that Brij will provide when the washing machine will be delivered to the customer's residence.

In this example, we have looked at the two types of services that the Retail Order Fulfilment Assistant provides to the customer.

The Retail Order Fulfilment Assistant provides a lot of services which a few services are mentioned below. The service by the SFE is complete only when he/she completes the process of successfully delivering it to the satisfaction of the customer.

Let's discuss each service in brief.

1. **Receiving new inventories –** The Retail Order Fulfilment Assistant is responsible for receiving the new inventories. When the Retail Order Fulfilment Assistant keeps selling the products, then the inventory levels go down. In such situations, the Retail Order Fulfilment Assistant needs to refill the inventories from time to time. Therefore, he/she needs to receive the inventories and store them appropriately.

Receiving new inventories

Warehousing

Picking products

Packing of orders

Shipping orders

Return processing

Fig. 1.3.1: Services provided by Retail Order Fulfilment Assistant

2. **Warehousing –** After collecting product deliveries from the distributor salesman or from vendors, the Retail Order Fulfilment Assistant needs to arrange the points from where the products can be provided to the customer in the least time. Such a retail warehouse is also called a fulfilment centre.

3. **Picking products –** Picking products refers to the action of gathering goods physically following the order or the reorder for packing. So, the Retail Order Fulfilment Assistant needs to organize the products in queues so that the products can be picked, packed and delivered to the customers on time. The queues of products can be made only once the packing list gets generated. The packing list contains the sequential details of all products, the quantities of products, etc. The products are set in queues according to the packing list.

4. **Packing orders –** The products are packed properly in carton boxes, envelopes, etc depending upon the products' size and quantities. The Retail Order Fulfilment Assistant packs the entire order of products and tries to reduce the usage of packaging materials to minimize the shipping costs.

5. **Shipping orders –** The majority of the retail stores tie up with delivery and courier companies for the purpose of delivering the products. When an order is placed, then the shipping companies are updated about the products' delivery. At the time of updating, the shipping date, shipping time, shipment address, and such details are also updated to the shipment companies. Hence, the Retail Order Fulfilment Assistant makes the proper format of delivery and provides all details to the shipping companies.

6. **Return processing –** Sometimes, the customers return the products if they don't like them or find any type of fault in the quality of the product. The Retail Order Fulfilment Assistant is held responsible for looking into the situations of return processing. He is expected to stay active and always ready for this problem. For exercising this activity, he/she can design a return management process to handle all queries relating to the product's returns to minimize the headaches and additional costs to the company.

This is a brief of the activities that are mainly performed by the Retail Order Fulfilment Assistant. In reality, the responsibilities of the Retail Order Fulfilment Assistant are quite more than the aforementioned points.

As far as the context of e-commerce is concerned, there is a slight change in the operations of Retail Order Fulfilment Assistant.

In the context of e-commerce, a customer can place an order from any place, and then the goods are delivered to the customer at the place where he/she wants.

• When the customer places an order, that order comes to the order manager through the webserver.

• The order manager checks out the location where the customer wants the order of goods. Meanwhile, he/she also checks the availability of goods in the stock.

• If the goods are not available in stock, then he/she places an order with the distributor salesman and checks by when the distributor salesman can provide goods.

• When the order manager receives confirmed availability of stock, he then processes the order.

• He also communicates with the merchant for receiving the payments from the customer with the available mode of payment like debit card, credit card, etc.

• After completion of payment, the order manager requests the warehouse to dispatch the goods.

• The delivery partner's truck arrives and then the goods are delivered to the customer.

In this sequence, we have studied the order manager. The order manager is one of the profiles to which the Retail Order Fulfilment Assistant gets promoted to after gaining experience and qualifications.

Activity

The Retail Order Fulfilment Assistant sells goods to the customers through in-store selling and e-commerce. The packaging of goods inside stores and e-commerce is pretty different. When the Retail Order Fulfilment Assistant provides goods to the retailer in-store, then the packaging style is different and when the goods are sold to the customers through an e-commerce website, then the packaging of delivered goods is different. Observe both packaging styles and note down any three differences between the packaging and express your views in the class.

UNIT 1.4: Significance of Backend Operations in Retail with Respect to Receiving, Storing, Processing and Delivering Goods/orders

Unit Objectives ⊙

By the end of this unit, the participants will be able to:

1. Explain the meaning of backend operations
2. State the difference between backend and front-end operations
3. Explain the operational services that are performed by the backend operations
4. Explain how the backend operations help the Retail Order Fulfilment Assistant in performing the retail functions

1.4.1 Role of Backend Operations in Retail Sector

The Retail Order Fulfilment Assistant generally comes in front of the customers. They directly deal with the customers. But the transaction process is not simple at all. Each sale transaction goes through several stages on the backend. The sales transactions take place through the backend mode. This is why there is a crucial role of backend operations in the retail sector. Let's understand the basic meaning of the backend operations first.

The backend operations are defined as the domain of back operations of any firm. In the retail sector, the backend operations signify the "behind the doors" domain of the firm. The customers generally cannot access this domain directly. The functionalities of any firm are impossible without the existence of backend operations. The backend operations ensure the proper functioning of a firm. These operations include the task of buying, warehousing, finance and accounting, human resources, administration, communication, etc., while the frontend operations pertain to customer-interfacing activities like Sales in retail.

In the retail sector, backend operations perform an important role. What is also true is that the backend operations are primarily dependent upon the front-end operations.

The front-end operations involve the sectors which handle the newer customers for the first time. In general, each customer is a new customer once. When newer customers visit the store, then these customers are firstly handled by the front-end operations. The front-end operations convince them to purchase the product by stating to them the product's features, usage, benefits, etc.

Let's see how the backend and frontend operations perform all activities altogether that work for the betterment of a firm.

The front-end operations directly interact with the new customers and convince them to buy the products. When the new customers start trusting the products and the qualities of the products, then the databases of these customers are forwarded to the back-end department. Further, the backend operations deal with the existing customers. Then, it can be said that the backend department does not only look into the tasks of maintaining the database of sales, handling customers' orders, etc. Instead, the backend department is also held responsible for retaining the existing customers.

- Let's see how the backend operations are important with respect to the several operations.
- The Retail Order Fulfilment Assistant receives the products from the distributor salesman. The backend operations help the Retail Order Fulfilment Assistant in placing those products in the warehouses. Also, the backend operations maintain the database of the products that have arrived.

This database involves the number of products and their brands, the quantities of brands, the maximum retail prices of products, the cost price of products (prices at which the products are purchased), etc. If the backend operations would not maintain this database, then conflicts may arise with the distributor salesman.

- The Retail Order Fulfilment Assistant stores the products in warehouses. The backend operations then record the number of products that are kept in the warehouse and the products kept on shelves in the database. If the backend operations would not record the quantities of stored products, then the Retail Order Fulfilment Assistant would not get the update on the need of refilling the warehouse with the new inventories.

- The Retail Order Fulfilment Assistant sells the products but the backend operations maintain the database of the orders which have been processed for delivery, orders whose invoices have been generated, the orders whose invoices have to been generated yet, etc.

- The Retail Order Fulfilment Assistant delivers the products to the customers, but, the backend operations record the database of orders which have been delivered, the orders which are yet to be delivered, the orders which have an issue that is yet to be resolved, etc.

Activity

Visit a retail store and note down the activities that are performed in the daily functioning of a retail store. Try to classify the activities into front-end and backend operations.

UNIT 1.5: Career Progression of Retail Order Fulfilment Assistant

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Explain the career progression map of the Retail Order Fulfilment Assistant

1.5.1 Career Progression

If an individual is working as a Retail Order Fulfilment Assistant, then it is quite sure that he/she will not be working in the same profile for a long tenure. Instead, he/she will keep moving towards the higher ends of his/her career. The domain sector of the Retail Order Fulfilment Assistant is the retail sector.

The Retail Order Fulfilment Assistant undergoes the following vertical progressions of the career map which are given below:

National business head

Category head

Merchnadisng Manager / Buyer

Product line manager/ Order manager

Merchant relationship manager

Service fulfillment executive

Fig. 1.5.1: Vertical career progression of Retail Order Fulfilment Assistant

As we already discussed in the introduction part of the Retail Order Fulfilment Assistant, it is understood that the Retail Order Fulfilment Assistant performs comprehensive functions in the daily functioning of a firm. These functions start from the receipts of products deliveries and then go up to the task of processing returns. It can be generally said that the Retail Order Fulfilment Assistant is held responsible for managing the entire retail store. On practicing the same functions for several years, the Retail Order Fulfilment Assistant gets prepared for taking up the managerial roles. Once he/she gets enough experience in performing all duties relating to the Retail Order Fulfilment Assistant, then he/she will take up the responsibility of merchant relationship manager.

In the domain of merchant relationship manager, the individual gets prepared to do excel in making interactions with the merchants. After making good contacts and products, an individual takes up the responsibility of product line manager in which he/she focuses on a single product line like footwear, clothing, etc. After years, the individual can get promoted to the position of category head in which he/she operates the specific product category like convenient goods, shopping goods, etc. In continuation of the experiences of several years and knowledge, the Retail Order Fulfilment Assistant can go up to the positions of category head and national business head.

Hence, it can be said that the Retail Order Fulfilment Assistant can get good exposure after getting relevant knowledge and experience. He/she can get the work of handling retail sales of a company or a firm throughout several countries of the world.

Activity

Perform a role play. Divide the class into a group of 5 people. Make the five chits that contain these names:

- Retail Order Fulfilment Assistant
- Merchant / Vendor relationship manager
- Product line manager
- Category head
- National category head

Each person will go to his/her concerned authority as per the chit that he/she will pick up. For example, in a group of 5 persons, an individual with the chit of Retail Order Fulfilment Assistant will find the person with the chit name of merchant relationship manager. The people will be standing in a queue in ascending order with respect to their hierarchical positions.

Summary

- Roles and responsibilities of the Retail Order Fulfilment Assistant
- Objectives of the Retail Order Fulfilment Assistant program
- Services that are provided by the Retail Order Fulfilment Assistant
- Services that are performed by the back-end operations
- Career progression of the Retail Order Fulfilment Assistant

Exercise

1. What do you mean by the Retail Order Fulfilment Assistant?
2. List the number of tasks and activities that are performed by the Retail Order Fulfilment Assistant.
3. Why is the course of Retail Order Fulfilment Assistant studied?
4. What do you mean by services?
5. A Retail Order Fulfilment Assistant resolves the query of a customer at whose place broken items have been delivered. In which type of category this service will be classified?
6. What do you mean by the backend operations?
7. How the backend and front-end operations co-operate the completion of retail operations?
8. How do the backend operations help the Retail Order Fulfilment Assistant in performing his/her tasks effectively?
9. List the job profiles on which the Retail Order Fulfilment Assistant can be hired if he/she has gained enough experience in handling all retail operations.

Notes

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Be a successful sales person	English phrases for sales person	Types of Retail Formats

2. Receiving and Storing Goods

Unit 2.1 - Planning and Preparation Before Receiving Goods

Unit 2.2 - Receiving, Recording and Reporting Goods

Unit 2.3 - Accurately Storing Incoming Goods

Unit 2.4 - Knowledge, Understanding and Skills to Demonstrated While Completing the Task Effectively

Key Learning Outcomes 💡

By the end of this module, the participants will be able to:

1. Demonstrate the preparations that are done before receiving goods
2. Explain the criterion of receiving goods
3. Explain the required conditions for storing goods
4. Develop the understanding and skills for doing these tasks efficiently

UNIT 2.1: Planning and Preparation Before Receiving Goods

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Explain the stock control system.
2. Describe the methods used for controlling stock levels.
3. Discuss the ways of ensuring enough storage space in the storeroom.
4. List the equipment's that are important to check before receiving goods.

2.1.1 Stock Control System
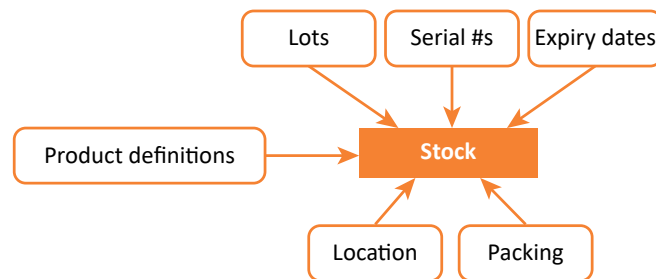
Fig. 2.1.1: stock control system

The Retail Order Fulfilment Assistant offers all retail services to the customers whosoever are visiting. But, the primary task of the Retail Order Fulfilment Assistant is to receive goods from the distributor salesman. If the Retail Order Fulfilment Assistant would not receive goods from the distributor salesman, then he/she would be unable to sell goods to the customer.

Let's take an example. Think of a retail store that is located in your neighborhood. You want to purchase a packet of instant noodles. When you will ask the Retail Order Fulfilment Assistant for a packet and if the Retail Order Fulfilment Assistant does not have the packets of instant noodles in the stock range, then he/she will probably refuse by stating that they do not have the same in their store. Think about what will you do?

Fig. 2.1.2: Instant Noodles

You will probably move to another retail store and purchase the packets from there. If you will like this store, then you will keep visiting this store only. Your needs will have been met. But the Retail Order Fulfilment Assistant will probably lose one of his/her customers that he/she cannot afford. The accumulation of individual customers makes the entire customer base. This is why it is quite necessary for the Retail Order Fulfilment Assistant to collect goods from the distributor salesman.

When he/she will receive goods from the distributor salesman for selling them further to the customer, he/she is required to keep track of the number of units of goods in the actual stocks. Here, a need for a stock control system arises. Let's study the concept of the stock control system in brief.

A stock control system is also known as the inventory control system. This system tells the number of stocks that are available in a store at any given time. This system also provides information on ways of keeping track of the available stocks. This system keeps track of all types of goods whether the goods are fully finished, work in progress, semi-finished, raw materials, etc. A retail store goes through the production process in which he/she first needs to purchase the goods from the distributor salesman and then sells the goods to the end-level customers. Once the stocks of goods are about to end, then the Retail Order Fulfilment Assistant needs to re-order the stocks to fill the inventory levels. The system helps the Retail Order Fulfilment Assistant in carrying out the entire production process.

Availability of goods in the stock

Before going forward, let's study the categories of goods that are available in stocks and whose data are stored in the stock control system.

Consumable goods	• Goods used in the daily functioning of the retail store like electrical equipment, etc.
Finished goods	• Goods that are ready for sale.
Semi-finished goods	• Goods that are not yet ready for sale
Raw materials	• Goods that are used in adding values to a few stocks.
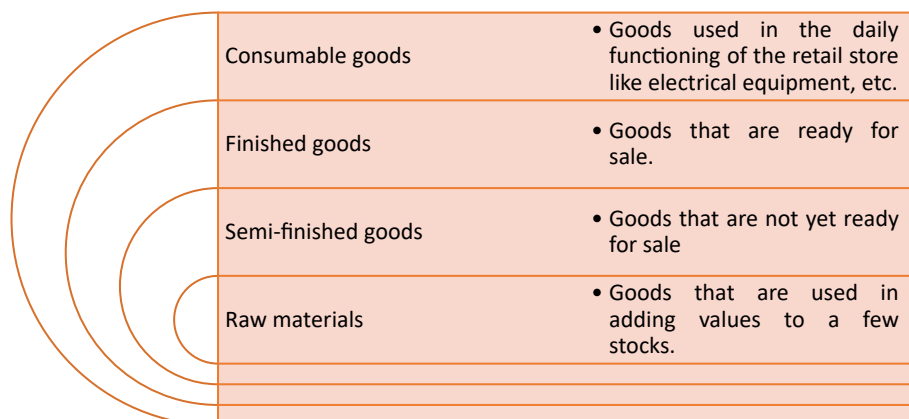
Fig. 2.1.3: Categories of Goods

The system contains entries of all types of stock that further helps the Retail Order Fulfilment Assistant to know the actual status of the stocks that are stored in a retail store.

Number of units of goods that should be kept in the stock

Each retail store keeps a different number of stocks and units. The reason is that each store is of a different size and has different ranges of product categories and services under operations, revenues, areas of business, etc. This is why the decision relating to the number of units that should be kept in stocks is primarily based upon two factors that are the size and nature of a business firm. For example, if a retail store is smaller in size, then the Retail Order Fulfilment Assistant should keep fewer units of goods in stock. If the Retail Order Fulfilment Assistant does not use the stock control system, then he/she mostly pursue one of these two approaches.

• Keeping no or fewer stocks
• Keeping the bulks of stocks

Let's discuss each approach in brief.

Keeping no or fewer stocks is an approach in which the Retail Order Fulfilment Assistant does not keep the goods in stock. Instead, he/she places the orders of goods when required as just-in-time fulfilment. This approach is beneficial or non-beneficial. The following table shows the advantages and disadvantages of this approach.

Advantages	Disadvantages
This approach is flexible as the service fulfilment executive orders when the demand arises.	This is expensive as the suppliers bear huge costs in delivering goods urgently. The service fulfilment executive needs to bear this cost.
The storage costs are negligible.	The business becomes more dependent on suppliers and their efficiencies in delivering goods immediately.

Fig. 2.1.4: Advantages and disadvantages of keeping no or fewer stock

Keeping the bulks of stocks is a situation where the Retail Order Fulfilment Assistant keeps a larger size of stock than required. This approach has certain advantages and disadvantages.

Advantages	Disadvantages
The service fulfilment executive does not run out of stocks.	Storage costs are higher.
Goods in bulk quantities are available at cheaper prices.	Goods may become spoiled or obsolete before final selling.
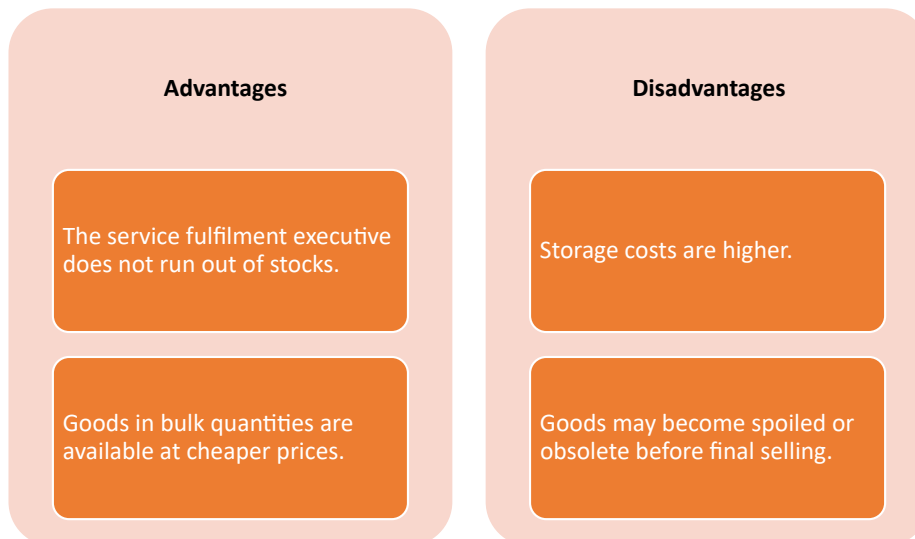
Fig. 2.1.5: Advantages and disadvantages of keeping stock in bulk

Each approach has certain advantages and disadvantages. This is why the Retail Order Fulfilment Assistant often requires the stock control system.

Method applying in controlling the stocks

Besides the stock control system, there are several methods that help in controlling the stock levels in the firm. These methods are provided below:

Minimum stock level

Just in time

Economic order quantity

FIFO

Batch control
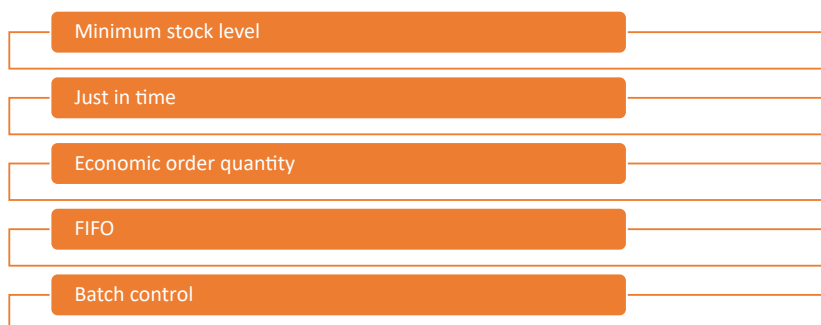
Fig. 2.1.6: Stock controlling methods

Let's study each method in detail.

1. **Minimum stock level –** The minimum stock level is a method in which the Retail Order Fulfilment Assistant needs to make a minimum amount of stock. If the available stock reaches the level, then he/she places an order with the distributor salesman again. To check whether the stocks are at the minimum order level or not, the Retail Order Fulfilment Assistant needs to review the available stock on the regular basis.

2. **Just in time –** Just in time is a method in which the products are delivered immediately. In this method, the Retail Order Fulfilment Assistant places an order when the demand arises. For following this method, the Retail Order Fulfilment Assistant needs to have assurance that the suppliers will provide the goods on an urgent basis.

3. **Economic order quantity –** The economic order quantity is the number of inventories that help in reducing the costs of holding inventories. The calculation of economic order quantity helps the Retail Order Fulfilment Assistant not reach the level of running out of inventories.

4. **FIFO –** The FIFO or the first in, first out is a method in which the first received goods are out first due to the danger of their spoilage. Hence, this method is often applied in the case of perishable goods.

Advantages of stock control system

There are certain advantages of the stock control system which are provided below:

Manual tracking of goods

Usage of software in tracking all inventories

Stock security

Controlling the stock's quality

Stock control administration

Fig. 2.1.7: Advantages of stock control system

1. **Manual tracking of goods –** In this step, the Retail Order Fulfilment Assistant assigns a barcode to the product and tracks the available number of products with the help of a barcode. The barcodes can be assigned with the help of system software and manual efforts.

2. **Usage of software in tracking all inventories –** A computerized system is majorly used for recording all information relating to the inventories. The software records all information relating to the barcodes, pricing, quantities of the products, invoices, etc. The stored information helps the service fulfilments executive to use this data and predict when to order a lot of new products. The service fulfilments executive keeps updated about the available quantities of products.

3. **Stock security –** Stock security becomes possible with the help of a stock control system. On the daily basis, there are several goods that are used in a retail store. It can be a computer system, regular inventories, etc. There are a few goods that can be moved from one place to another in a shorter span of time, then the chances of thieveries of those goods generally rise. With the help of this system, a radio frequency identification tag is attached to each product. When any product is displaced, then a type of alarm starts ringing. The data relating to the actual displacement of the product helps the service fulfilments executive in storing the stocks appropriately.

4. **Controlling the stock's quality –** The data relating to the manufacturing date of a good, expiry date of a good, etc are also stored in RFID tags. These tags help in knowing the goods that have to be sold by the earliest. In general, these tags help the service fulfilments executive to know the overall quality factors of the stock that is presented in the retail store.

5. **Stock control administration –** As far as the context of stock control administration is concerned, then there are several people who are required for managing the tasks relating to stock control. For example, one person will record data entry relating to the stocks and another individual will have to manage the reviewing task of available stocks.

2.1.2 Storage Space Availability

Before receiving goods from the distributor salesman, it is important that there should be enough availability of shelf space and storage space. If the retail store does not have the space for storing goods, then there is no point to receive goods from the distributor salesman. Before confirming the availability of storage space, let's discuss the concept of storage space.

We already know the meaning of storage and space. A retail store expects to be organized, neat and clean so that the customers can easily find the products and buy them. People also like to go shopping in those stores where they can find the goods easily. In fact, a well-organized store does not create a need for hiring an executive who can assist the customers in searching for the product. Each customer can go to the place where their required goods are kept. Each retail store can have only a limited land capacity as the capacity of the place cannot go beyond the limitation. A retail store needs to utilize the available space so that a larger number of goods can be fitted in the small area of the place.

In many cases Space management comes to the rescue. Space management is defined as a process in which the space of stores is utilized properly so that it can offer good shopping experiences to the customers. If the customers' experiences are higher, then more customers will become the part of retail store and the arrival of existing customers will also increase.

Different types of products stored in a store

There are different types of products that fill the shelves of a store. These products are provided below:
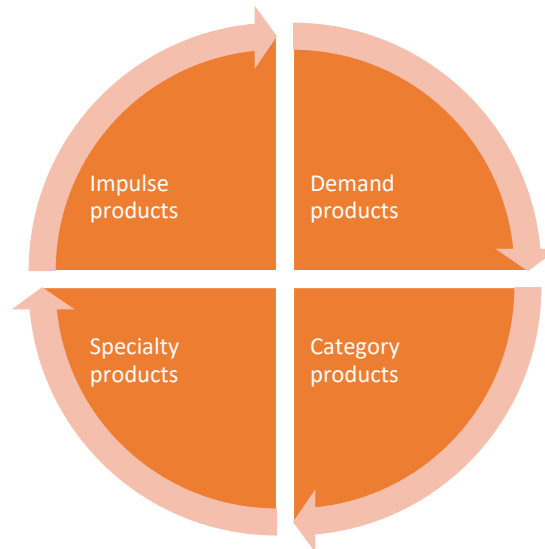
Fig. 2.1.8: Types of products

- Impulse products – Impulse products are not often need based. Instead, people purchase these products because they are attracted to these products. For example, candles, chewing gums, etc.
- Demand products – The demand products are regularly consumed by the customers in their daily consumption. For example, bread, milk, etc.
- Category products – The category products are purchased by the customers after doing in-depth research before arriving at the final purchasing decision. For example, laptops, etc.
- Specialty products – The specialty products are purchased by the customers when the retail store offers any specialized product.

Different layouts of keeping goods in a retail store

There are different layouts in a retail store in which the goods can be kept. The following layouts are provided below:

Free Form Layout
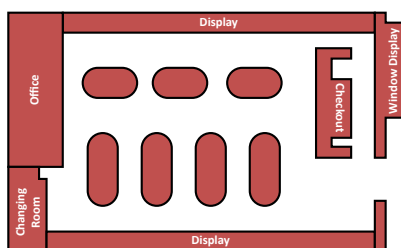
In this form of layout, the products are kept randomly without any organization.

Grid Layout
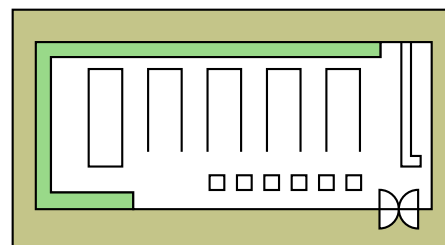
In this form of layout, the products are displayed in proper grids where the larger number of products can be displayed easily.

LOOP LAYOUT:

HERRINGBONE LAYOUT:
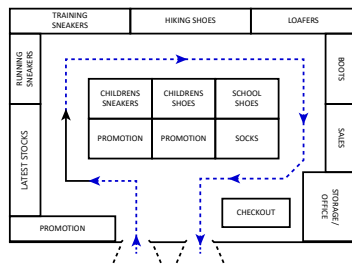
In this layout, the products are displayed in such a manner in which the customers enter into the store and exit from another door by watching out all of the available products.

In this layout, the shelves are narrow where the goods are majorly hidden.

Fig. 2.1.8: Different layouts in Retail store

The Retail Order Fulfilment Assistant needs to think in which order, he/she is going to place the goods. Usually, supermarkets and food category sores follow the grid or the herringbone layout.

Importance of managing storage space availability

Fig. 2.1.9: Importance of managing storage space

1. Increasing sales – Neat and clean space and well-organized display of products increase the chances of customers' arrival. As a result, they are more interested to visit the retail store, and henceforth, the volume of sales rises.

2. Easy search of the product – The customers like to visit the stores where they do not need to take the stress of finding the product. Shopping acts as a distressing exercise for the customers. Therefore, an organized space also gives pleasure and happiness to the customers.

3. Helps in controlling the rush – During peak hours (The time when the larger number of customers visit the store), the rush can be cleared out in the least time because the customers would spend less time for purchasing the goods.

After studying the importance of storage requirements and related information, it can be said that space utilising the space properly and effectively is important for a retail store. Therefore, it is required for each retail store to confirm the availability of space before placing an order of products from the distributor salesman.

Besides conformity, let's discuss what can be done in order to improve the storage space efficiently.

• The service fulfilments executive should measure the area of the store appropriately. The size and shape of each store should be measured to allocate the placement of different varieties of products.

• The difference between areas of goods display and non-display should be made. The non-display areas of products are the cash counter and related areas.

• The layout of each retail store should be decided appropriately with respect to the size and type of retail store.

• The space should be allocated to the goods with respect to the sales history of a firm.

• The products of similar categories should be displayed in the specific area of a retail store.

• If the products are of irregular sizes, then proper planning should be made in order to place such products.

• A small segment of the area is left for window displaying of goods.

Receipt of goods only which are enriched in quality

When the goods are received in the retail store, then the goods may be fit to use or could be damaged. Receiving goods that are fit to use are good for the retail store. But if the damaged goods are received, then it becomes important to send them back otherwise the retail store starts bearing losses. This is why the service fulfilments executive needs to ensure the received goods are in proper working condition. Before checking the received goods, it is required to check the availability of equipment that helps in checking the good working conditions of the received goods. The following equipment is provided below:

Fig. 2.1.10: Equipments used in Retail store for receiving Goods

Let's discuss all types of equipment in detail.

• Equipment for storeroom – There are a few types of equipment that are required for a storeroom like trash bags, trash cans, pricing guns, etc. The types of equipment are generally used in the retail store.

• Equipment for the backroom – The equipment like chairs, tables, coffee pots, refrigerators, etc are used in the back room where the workers can get freshen up.

• Equipment for office – The equipment like a computer system, a cabinet, etc are required for carrying out the official activities in a retail store.

- Equipment for sales floor – The equipment like baskets, trollies, carts, etc are needed on the sales floor.
- Equipment for specific needs – There can be certain equipment that is specialized for keeping specialized types of products. For example, if a retail store keeps instant cooked food packets, then the store needs to keep a deep fridge in order to save them from getting spoiled.

Let's see how this equipment affects the goods' receipt from the distributor salesman.

- The goods are brought in cartons and polythene bags. Once the received goods are loaded on the shelves, then these cartons and bags are generally discarded. In order to collect such garbage, trash bags are required. An entire lot of goods is checked and loaded in front of the distributor salesman or his/her delivery personnel.
- The people whosoever brings goods in a retail store for delivery, it is the basic duty of the service fulfilments executive to provide chairs and tea for their refreshment.
- The data relating to the goods' receipts are made with the help of the computer.
- The goods are carried in the storeroom with the help of carts and trollies.
- If the received goods are of perishable nature, then those goods are stored in a deep fridge.

If such equipment would not work properly, then the service fulfilments executive cannot make sure of the appropriate receipt of goods.

Required paperwork relating to the goods' receipts

When the distributor salesman delivers the goods, then he/she carries a bill of lading.

The bill of lading is defined as a document that contains all details relating to the shipment of goods like the type of goods, quantity of goods, etc. This distributor salesman needs to get this bill signed by the service fulfilments executive. Therefore, the service fulfilments executive must be aware of this rule and there should be an assigned person at the store who signs the bill of lading by confirming the details of an entire lot of product delivery.

Tidy and obstruction-free area of receiving goods

If it is the responsibility of the distributor salesman to deliver the goods that are in good working condition, then it is also the responsibility of a service fulfilments executive to carry the goods from the delivery truck to the storeroom. This is because the distributor salesman does not take the responsibility of working order of goods after carrying the goods to the storeroom.

There are certain ways by which the tidy and obstruction area of goods' receipts can be ensured.

1. **Cleaning of receiving bay –** The path or a bay through which goods are carried from the delivery truck to the storeroom should be cleaned. If the bays become cleaned and organized, then the potential hazards relating to the bay reduce. The potential hazard can be
   - Hit by trolleys
   - Slipping on the floor
   - Hit by the packaging cutting tools

Ways to ensure the cleaned bay:

- Every good place in the bay should have an appropriate place.
- All cutting materials should not be kept in the bays.
- Appropriate cleaning of bays should be done multiple times a day.

2. **Security in the receiving bay –** The path of the bay is crucial to each retail store. This is because the bays are used for refilling the inventories. But if any person may come to the bay, then it becomes difficult for the Retail Order Fulfilment Assistant to ensure the smooth carriage of goods. By following these activities, the security of bays can be ensured:

- The bays need to be secured so that only staff members are only allowed to come into the bays.
- Appropriate CCTV cameras should be installed in the bays.
- The bay area should be locked and opened only when the goods arrive at the retail store.

3. **Usage of technology –** With the passage of time, new technologies are being invented day by day. The technology is used to organize the bays so that the goods can be carried from one place to another in an easier manner. The technology has provided several inputs that help in organizing the bays more efficiently. These inputs include:

- RFID tags are used to track the product so that if the products are placed in bulk quantities. These tags help the service fulfilments executive to search for the product.
- Conveyor belts are used in the movement of goods from one place to another within the bays.
- In the retail store, the service fulfilments executive can also take the help of the robots. The robots are instructed where they have to put the goods.

Whom to report in case of a mishap

It is quite possible that the storage space or related equipment can undergo any type of issue like spoilage of any equipment, shortage of storage space for storing goods, etc. In such cases, the service fulfilments executive cannot sit idle. Instead, he/she requires to report to the concerning authority immediately. The report can be done through telephonic conversation. Instead, he/she should call the authority besides making the written report. The authority can be the following person:

- The supervisor who is directly watching your activities.
- Duty manager to whom you need to report.
- Owner of the retail store
- The maintenance department which is responsible for maintaining the premises of the retail store.

Activity

Make a group of 4 participants. Collect 40 pens or pencils from the entire classroom. Make a lot of 10 pens or pencils. Assume that the pens or pencils are inventories. Each student will display the 10 pens or pencils in a different layout. At the end of the activity, each team will have four layouts. Discuss which type of layout suits the displaying of these inventories in an efficient manner.

UNIT 2.2: Receiving, Recording and Reporting Goods

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Demonstrate the steps performed in receiving goods.
2. Explain the concept of the delivery note.
3. Explain why the refusals should be recorded.

2.2.1 Rituals Followed Out in Receiving Goods

In the previous unit, we studied the preparations that are done before receiving goods. When the goods are received, then there are certain duties that are followed out while receiving these goods. Receiving goods is not a single activity, instead, this is a full-proof process that involves the list of following activities:

Matching arrived goods with the purchase order

Checking the working condition of received goods

Data entry of the received goods in the system

Unpacking of received goods

Forwarded good received note or a delivery note to the accounts team

Fig. 2.2.1: Process of receiving goods

Let's understand each process in detail.

Matching arrived goods with the purchase order

When a service fulfilments executive places an order of goods to the distributor salesman, then he/she generates the purchase order.

The purchase order contains all details relating to the goods like types of goods, quantities of goods, prices of goods, shipment charges, and other conditions. When the distributor salesman hands over the carton boxes of goods to the service fulfilments executive, then the service fulfilments executive matches the products with the purchase order. Besides this, the service fulfilments executive needs to record other information which is given below:

- Date and time on which goods have arrived.
- Name of deliveryman and delivery partner
- Name of the service fulfilments executive who is actually receiving the goods.

Checking the working condition of received goods

Once the products are matched against the purchase order, then the service fulfilments executive needs to quality check on the received goods. If the goods are brought in a fewer number of cartons, then the service fulfilments executive needs to check all carton boxes. And if the goods are brought in larger quantities, then the service fulfilments executive can randomly open any one or two carton boxes for quality check.

While doing the quality check, if the service fulfilments executive finds any fault in the received goods, then he/she records the damages and informs the distributor salesman about the same.

Data entry of the received goods in the system

After a quick quality check, if the service fulfilments executive carries the carton boxes into the warehouse and records all entries of goods' receipts vide a Goods Received Note popularly known as GRN along with their details in the system.

Unpacking of received goods

After carrying the carton boxes to the warehouse, the carton boxes are opened. After opening the carton box, the goods are taken out of the box and checked if they are fine or not. Afterward, the goods are placed on the shelves in the warehouse.

Forward goods received note to the accounts team

The distributor salesman issues the goods received a note or a delivery note to the service fulfilments executive that is forwarded to the accounts team for their reference. The accounts team matches the notes with the invoices that the distributor salesman generates for the retailer.

2.2.2 Receiving Goods with Respect to the Delivery Note

The delivery note is a document that contains the entire details of goods that the distributor salesman has supplied to the service fulfilments executive. This note is issued by the service fulfilments executive who gives the confirmation that he/she has received all goods for which the order had been placed.

If the service fulfilments executive does not find all goods in a proper working condition, then he/she only issue goods received note or delivery note for the goods only whose working conditions are good.

Let's see what the good, received note or delivery note looks like:

ABC Private Limited					
Suppliers' name	_____ _____			Date and time	_____ _____
Order number	_____			Location of delivery	_____ _____
S.no	Description of goods	Size	Quantity		Comments
	Total amount			_____	
Received order by	_____			Checked order by	_____

Fig. 2.2.2: Delivery note

Procedure of issuing the delivery note

There are certain steps that are followed in issuing the delivery note which is mentioned below:

1. The distributor salesman generates the invoice and purchases the order when the goods are dispatched. He/she generally sends the invoices through e-mail and paper receipt.
2. The service fulfilments executive supervises the order against the purchase order. He/she needs to ensure the quality and quantity of goods that have been received along with ap-propriate quality analysis.
3. If the service fulfilments executive finds any type of fault, then he/she will contact the supplier directly.
4. On the settlement of the above issues, the service fulfilments executive issues the deliv-ery note or good received note by stating that he/she has received the order and all goods are in correct working order.
5. The service fulfilments executive will forward the note to the accounts department for their database and making payments.

Usage of the delivery note

The delivery note is used in the following directions:

The distributor salesman and service fulfilment executive require the records so that any type of problem relating to financial auditing can be answered. The delivery note is used as a record for both parties.

The distributor salesman gets an assurance that the service fulfilment executive has received the right and appropriate goods.

The delivery note acts as an entry for managing the inventories.

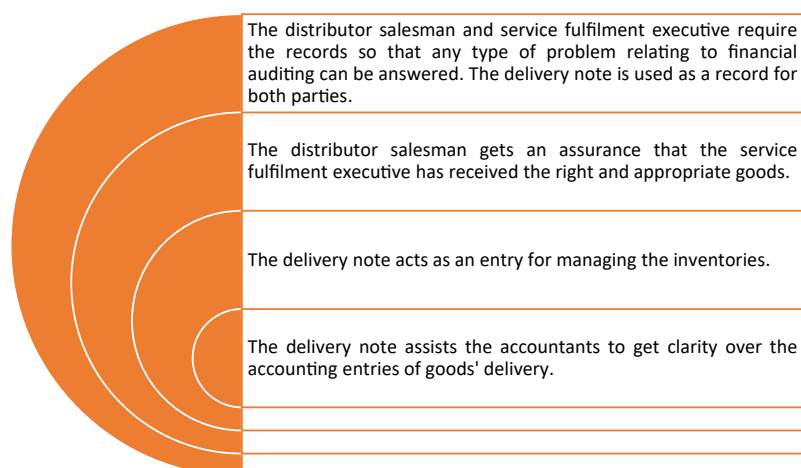The delivery note assists the accountants to get clarity over the accounting entries of goods' delivery.

Fig. 2.2.3: Importance of delivery note

2.2.3 Recording of Refusals

As far as the context of receiving goods is concerned, if the service fulfilments executive places an order, then there is no assurance that he/she would definitely receive the goods. The distributor salesman can refuse for supplying the orders. Refusing the order of the service fulfilments executive is completely legal but the reason for refusal should be relevant.

Relevant reasons for refusal:

1. When the distributor salesman is unsure of the payment process or there is a an outstanding payment yet to be cleared from the retail store's side.
2. When the distributor salesman finds that the cost incurred in supplying goods to the service fulfilments executive is huge.

Non-relevant reason for refusal:

1. When the distributor salesman is unwilling to supply goods due to his/her higher market power.
2. When the distributor salesman boycotts the service fulfilments executive due to any influence or personal reasons.
3. When the distributor salesman enters into the exclusive contract of supply with any specific retail store.
4. When the distributor salesman is unable to provide the reason for refusing the supply of goods.

Now a question arises that why it is required for the service fulfilments executive to put concentration on refusals. Let's understand this need with the help of an example.

For example, a service fulfilments executive places an order of goods to the distributor salesman named A. The service fulfilments executive needs to supply the goods to the customers within four days. After one day, A refuses for supplying the goods and the service fulfilments executive gets stressed because the customer's delivery has to happen within three days. In such a scenario, the service fulfilments executive places an order to another distributor salesman named B on an urgent basis. Due to this urgency, the service fulfilments executive has to pay a little extra price to B which hampers the profit margins of the retail store of the service fulfilments executive.

After a month, a service fulfilments executive receives an order of goods that has to be delivered after three days. He/she makes an order to A. After one day, A refuses for supplying the order. Now, the service fulfilments executive has only two days to make deliveries. Here, the chance of commitment failure has increased. But if the service fulfilments executive has recorded the prior refusal of the distributor salesman, then he/she would not have contacted that distributor salesman first. This is why it is required to record refusals.

The refusals are recorded with respect to the standard procedures of organization. The retail store is also an organization that works on specific rules and guidelines.

Each retail store uses different software for recording data entries relating to the orders receipt, invoices, delivery notes, etc. Then, each software has a different criterion for recording entries and operations. This is why all service fulfilments executives cannot use the common approach to record all entries. For example, if a retail store works on oracle, then the service fulfilments executive has to understand the criterion of data recording with the accordance of oracle.

Thus, it is the primary duty of the service fulfilments executive to record the refusals with respect to the standard procedures of different organizations.

2.2.4 Updating Stock Control System to Record Goods' Receipts

We have already studied the stock control system in the previous unit. The stock control system provides the available amounts of goods in the stock. The availability of goods can be known only when the data of receiving goods will also be entered into the system. If the service fulfilments executive records all data relating to goods' receipts when the goods arrive in the retail store, then he/she can get to know the exact availability of stocks at the given time.

Regular updating goods' receipts in the system prevent the retail store from the problem of overstocking. The service fulfilments executive cannot afford to run out of stocks. The availability of stocks fulfils the demands of customers whosoever visit the retail store. Due to the continual availability of stocks, the service fulfilments executive keeps placing an order of goods to the distributor salesman, but if he/she knows the current availability of any product, then he/she is supposed to place an optimal order of goods.

This is because continual receiving of goods can lead to the problem of overstocking in the market. In such a situation, the retail store will bear heavy losses due to timely obsolescence.

Also, the service fulfilments executive would not need to make a guess before placing a goods order. Instead, he/she can refer to the available data and place the optimal amount of orders.

The service fulfilments executive can better reach the solution relating to the damaged goods. Therefore, it is essential for him to regularly update the available amounts of goods in the stock control system.

Activity

There is a quote saying that "A few rejections do not touch the hearts, instead bring the excessive financial burden on the revenues". Explain the rationale of this quote on one page.

UNIT 2.3: Accurately Storing Incoming Goods

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Describe the condition required for storage places
2. Explain the handling procedures of perishable and non-perishable goods.
3. Follow administrative procedures to ensure accurate completion of all tasks.
4. Explain how to rotate the stocks in order to avoid the costs of inventory wastage.

2.3.1 Confirming the Conditions of Storage Places

Once the formalities of receiving goods get completed, then the responsibility of storing goods increases. The reason is that after confirming the goods' receipts on the delivery note, it becomes the responsibility of the service fulfilments executive to store goods accurately. This is because if any good gets damaged in the retail store, then the distributor salesman does not take the responsibility for those damaged goods. Instead, the service fulfilments executive is supposed to store the goods efficiently.

The service fulfilments executive needs to know the requirement of storing goods efficiently and effectively. The requirements are provided below:

- Accurate storage of goods clears the mid area of the warehouse or storeroom. Then, the other goods which are being carried from outside also get the good space for carriage.
- Accurate storage of goods leads to the know-how of available goods in the storeroom. This reduces the chance of thieveries that could happen in the storeroom.
- The goods are stored in cartons or shelves. The goods are placed in a chronological form so that the likely damage of products also gets reduced.
- The goods become protected from potential hazards and spoilage if they are stored properly.

In order to ensure the appropriate conditions and requirements for storing goods, the service fulfilments executive must have an in-depth understanding of inspection practices, timing of inspection, cleanliness of storage areas, etc.

Inspection practices

The inspection practices involve certain steps or areas in which the service fulfilments executive needs to put focus on the following areas:

- Floors, ceilings, and walls of storage areas – The walls, ceilings, and floors of storage areas should be cleaned enough.
- Storage containers of storage areas – The goods are kept in storage containers that look like boxes or shelves, etc. The storage containers should not be broken.
- Continuous forming and updating inspection schedules – The inspection schedules are the calendars in which the inspection dates of storage areas are mentioned. The service fulfilments executives keep these schedules with themselves and keep inspecting storage areas routinely with respect to the inspection schedules.

Let's see how the inspection schedule looks like:

ABC Retail Store				
Inspection Schedule				
Place of inspection _____			Tenure of schedule: _____	
S.no	Inspection task	Name of inspec-tor	Ex-pected date of inspec-tion	Actual date of in-spection
Inspection manager: _____		Date of issuing inspection schedule: _____	Sign of inspection manager: _____	

Fig. 2.3.1: Inspection schedule Receipt

- Formation of appropriate inspection checklist – The inspection checklist contains the certain areas which are needed to be inspected. This checklist contains certain activities that are checked by the inspector after verifying the correct working order of all activities.
- Any sort of physical damage in the storage areas – The storage areas should not have any physical damage like cracked doors, ceiling dampness, etc.

Appropriate timing of the inspection

The inspection of storage areas does not only involve the storage of stock areas. Instead, this activity includes the keep watch out for the available stock levels of the storeroom. Now, a basic question arises when the storeroom should be inspected. This is because the inspection cannot be carried out on the daily basis. Also, the inspection cannot be carried out once a year. There are certain times on which the inspection should be carried out:

The correct timing for carrying out the inspection is provided below:

1. The stock levels should be checked once in the storeroom when the time of placing new order arrives.
2. When the service fulfilments executive places an order for new types of goods, then an inspection should be done.
3. When pest-control activities are being carried out in the storeroom.
4. When the storage areas are being cleaned as per the routines.
5. When the stocks are being carried out from the storeroom to the store shelves.

Cleanliness and maintenance of storage areas

We have understood the importance of cleaning storage areas. The cleaned storage areas are categorized as the important premise of the retail stores. Therefore, the storage areas should be cleaned and maintained appropriately in order to store goods accurately.

There are certain steps that ensure the appropriate cleanliness and maintenance of storage areas:

• There should be no spills on the floor in the storage areas.

• The cleaning schedules of the storage areas should be implemented.

• All packaging materials and related wastes should be disposed of immediately.

• The area should be cleared for walking into the storeroom.

• The storage areas should be ventilated so that no pesticides could attack the storage rooms.

• The storage areas should have enough amounts of refrigerators so that the required goods can be refrigerated.

• All benches, shelves, pallets, fixtures, etc should be in correct working order in the storage areas.

• All equipment should be placed in the storage areas by adhering to the occupational health and safety requirements.

• There should be appropriate lights in the storage areas so that all goods are visible to the service fulfilments executive.

• The doors of storage areas should be appropriate so that no unauthorized person can enter the storeroom. There should be a restriction to the arrival of all people in the storeroom.

• The fire alarm should be installed in the storeroom so that the probability of catching fire can be lowered down in the storeroom.

2.3.2 Handling Procedures of Perishable and Non-perishable Goods

A retail store keeps several varieties of goods that are either perishable or non-perishable. There are different procedures for handling both types of goods. The service fulfilments executive cannot treat both types of goods in the same manner. Before moving to the concept of handling procedures for treating both types of goods, it is necessary to create a fine distinguishing line between perishable and non-perishable goods.

Let's study the concept of perishable and non-perishable goods.

Handling procedure of perishable goods

Perishable goods are defined as goods that do not last long. These goods get expired in a very few days. It can be said that these goods come with a very smaller clock cycle. Once the life of these goods crosses that clock, then these goods do not remain good for usage anymore. After crossing this clock, these goods become waste and only increase the losses for the retail store. For example, meat, milk, curd, buttermilk, fruits, vegetables, etc.

Fig. 2.3.2: Perishable goods

In general, perishable goods are mostly food items. But yes, there are a few more perishable goods like flowers, plants, etc. Even the goods which are part of services are also found as perishable goods. For example, concert tickets, movie tickets, and live events are also categorized as perishable. This is because these tickets can only be used till the ending minute of the concerts, live events, etc. Hence, these goods also come with a smaller clock cycle.

When the clock cycle of goods is so smaller, then the duties of service fulfilments executives generally get increased. This is because if the major portion of perishable goods would become spoiled, then the overall losses of the retail store would also rise. Let's understand why it is important to handle perishable goods. The importance of handling perishable goods is provided below:

1. **Improvement in revenues –** The perishable goods drive the retail store into severe losses. If the perishable goods would be sold within time, then the revenues of the retail store would rise.

2. **Improvement in cash flows –** The service fulfilments executive needs to clear the bills of perishable goods. If all perishable goods would be sold, then the revenues of these goods helps in clearing off the bills in the least time. The cash flow position of the retail store remains good.

3. **Improvement in customer satisfaction –** When all perishable goods get sold by the time, then the chances of customers getting expired goods decrease. Hence, the customer remains more contented.

There are certain steps that can be followed in handling perishable goods. The following steps are provided below:

1. The FIFO method can be adopted in which the first-in or oldest inventories get sold first. The first comer goods are sold first. By adopting this method, the service fulfilments executive can minimize the losses. He/she gets more time for selling newer goods and clearance of the oldest inventories reduces the chances of losses.

2. The service fulfilments executive can adopt the single-period inventory system. Under this system, the service fulfilments executive places an order of the products and does not re-order before selling all the oldest inventories.

3. The service fulfilments executive should have the know-how of the stocks which he/she is selling. For example, if the stock purchased from one distributor salesman gets sold in the least time as compared to the stock purchased from another distributor salesman, then the service fulfilments executive should know which distributor salesman is offering good qualitative products.

4. The service fulfilments executive should regularly audit the available stocks in a span of fewer days. In such a scenario, the service fulfilments executive keeps getting an update on the current status of available stocks.

5. The refrigeration conditions and temperature of the storeroom should be checked twice or thrice a day in order to check the correct working conditions of stocks. This is because optimal storage conditions ensure that the spoiled perishable goods would not drive the retail store in losses. The lifeline of perishable goods generally increases by using the optimal storage conditions for the goods.

Handling procedure of non-perishable goods

Like perishable goods, there is a requirement to handle non-perishable goods too. Non-perishable goods are defined as goods whose expiry dates do not come early. These goods have a longer clock or life cycle and also do not require refrigeration or any special storage condition. For example, pulses, rice, dry fruits, etc.

Fig. 2.3.3: Non-perishable goods

Obviously, unlike perishable goods, it is easy to handle non-perishable goods. The non-perishable goods are generally stored normally at room temperature. These goods just require timely rotation so that the oldest inventories get cleared off early. This is because these goods have a longer life cycle but still, these goods also become expired one day.

2.3.3 Adherence to Organizational Policies and Procedures

You might have come across a few common phrases like "Our retail store has a policy of accepting payments through credit or debit cards only", "Our retail store has a policy of not dealing with the goods which have been sold once", etc. There is one common word "policy" in both phrases.

The policies are defined as the list of rules mentioned in the organization's rule book that all parties have to follow, who are part of the organization. The adherence to policies is majorly applied to the employees. All employees are supposed to comply with the policies in order to have smooth functioning of the firm. By complying with all policies, it can be ensured that the organization is undergoing smoother operations. The different organizations have different policies.

As far as the context of organizational procedures is concerned, then the procedures are defined as the process that is being followed in the daily functioning of an organization.

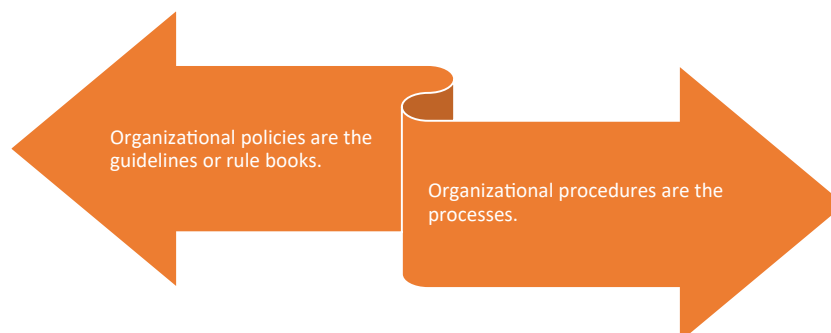There is a fine difference between organizational policies and procedures which is mentioned below;

Organizational policies are the guidelines or rule books.

Organizational procedures are the processes.

Fig. 2.3.4: Difference between Organizational policies and Organizational Procedures

Similarly, the policies and procedures are also designed for the service fulfilments executive. All service fulfilments executive needs to follow all policies and procedures. The importance of adhering to policies and procedures is provided below:

• By adhering to all policies and procedures, the organization can run with smoother operations.

• When all employees would know the policies and procedures of the respective organization, then they would become capable to serve the customers with good services.

• Explained policies and procedures to reduce the chance of potential hazards that could happen in the retail store.

For ensuring compliance with policies and procedures, each retail store needs to follow two main dimensions.

Organizational manual	Proper training
•Each retail store has its own organization manual that is given to each employee at the time of joining. But a few organizations remain unwilling to spend time and cost on manufacturing the manuals. But this scenario increases the confusion among employees. hence, all retail stores should draft manuals. •The manuals provide appropriate guidelines to the service fulfilment executives to carry out daily operations.	•Merely, giving manuals is not enough. If the manuals are just distributed, then the employees do not take interest in reading that. •The service fulfilment executives should be provided appropriate training with the help of proper induction and seminars.

Fig. 2.3.5: Dimensions of Organisational policies and procedures

2.3.4 Administrative Procedures for Stock Rotation

Stock rotation is defined as the practice of rotating the goods within the shelves. The goods are rotated in order to reduce the wastage of inventories in the retail store. Not only in retail stores but the goods are also rotated in the warehouses too. Before moving forward with the concept of administrative procedures for stock rotation, it is important to understand the importance of stock rotation.

The stock rotation is important due to the following reasons:

1. The stock rotation reduces the stock losses. With the help of stock rotation, it is ensured that the outdated stocks get cleared in the least time.

2. The stocks which become too older become unattractive to the customers. The packaging of older inventories becomes pale. This is why the customers are less willing to purchase such items.

3. If the older stocks are kept on the shelves for a too long time, then the risks of damaging those stocks increase.

Generally, the concept of stock rotation is applied to the majority of stocks. This is because all stocks come with a certain expiry date. Although, the expiry date of the stocks could be a few days, a few months, or a few years. This is why it is the primary duty of the service fulfilments executive to rotate the goods.

Likewise, we studied the concept of organizational policies and procedures in this unit. The administrative procedures are also the process that is basically followed out in the retail store. As far as the context of stock rotation is concerned, there are four types of stock rotation.
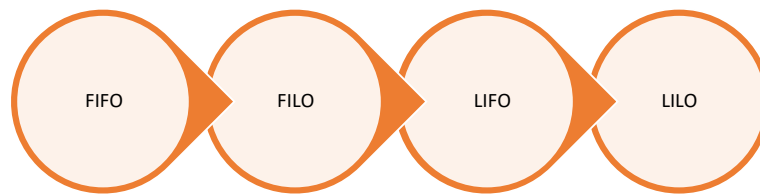
Fig. 2.3.4: Types of stock Rotation

Let's discuss each option in brief:

FIFO	FILO	LIFO	LILO
This method is explained as first in, first out. In this system, the stocks purchased are sold first.	The FILO is stated as the first in, last out method. The stocks purchased for the first time are sold at the last in this system.	The LIFO system is called as a last-in, first-out system. In this system, the stocks purchased at the last are sold first.	The LILO is known as the last in, last out system. In this type of stocks rotation, the stocks purchased at the last are also sold at the last.

Fig. 23.5: Description for types of Stock Rotation

When the stocks reach an end on the shelves, then the service fulfilments executive refills the shelves by rotating the stocks from the storeroom to the displaying shelves of the store. In each type of organization, a different type of stock rotation is used. It is usually seen that the majority of the retail stores use the option of the FIFO method, but still, the service fulfilments executive should use the type of stock rotation that is suggested by the administration of an organization.

1. Explain how good storage conditions can be ensured in the storeroom?
2. State the difference between perishable and non-perishable goods.
3. A service fulfilments executive bears huge costs of inventories wastage. This is because the vegetables and fruits are the larger portions of the inventory of the store. Suggest some measures to the service fulfilments executive in order to save such costs.
4. Explain the types of stock rotation. Which type of stock rotation is suitable for non-perishable goods?

Activity

Give any product's name to each student. Ask them to give a speech on how he/she will store that product in the storeroom and how that product will be rotated.

UNIT 2.4: Knowledge, Understanding and Skills to Demonstrated While Completing the Task Effectively

Unit Objectives

By the end of this unit, the participants will be able to:

1. Demonstrate the knowledge and skills required for receiving and storing goods

2.4.1 Knowledge Required for Making Preparations before Receiving Goods

In the previous units, we have studied that the receipt and storage of goods is not an easy task for the service fulfilments executive. There are a lot of steps and concerns into which the service fulfilments executive is needed to put his/her efforts. In the module, we have studied that the service fulfilments executive needs to make some preparations before receiving goods, a few steps are performed in order to receive the goods and store goods. Before moving forward to the concept of knowledge and skills required for making preparations for receiving goods, goods' receipts, and the storage of goods, we must know the basic meanings of knowledge and skills.

Knowledge is defined as the certain facts that a person is supposed to know either for improving personal knowledge or for completing any concerned task with efficiency and effectiveness.

Let's see which type of knowledge the service fulfilments executive should have in order to make preparations for receiving goods, actual receiving of goods, and storing goods respectively.

The service fulfilments executive should have the following knowledge and understanding prior to the actual goods' receipts:

Know-how of supervisors and checking product shortages or overstocks

The service fulfilments executive is expected to place the order of products after knowing the current status of stocks that are placed in the storeroom. When the service fulfilments executive checks the actual status of stocks, then it helps him/her to know how much amount of product he/she needs to place an order.

It may happen at a given time, that there is a shortage of a few products or a few products are overstocked. In such situations, he/she often needs to report this concern to his/her supervisor. Afterward, the supervisor will further place the order of products accordingly.

For example, a service fulfilments executive named Arvind checked the current availability of stocks. He found that the products were overstocked. He decided to report this to his/her authority. But he did not know his/her supervisor. His supervisor was Bimlesh, but he reported this concern to Maithili, the merchant relationship manager. Unknowingly, Bimlesh placed the order of the products which were already overstocked. When the products arrived at the retail store and were placed in the storeroom, then Bimlesh got to know about the overstocking of a few products. Then, the monetary funds of the retail store were blocked in the overstocks of a few products. She blamed Arvind for his non-accomplishment of duties at the retail store.

In this example, it can be seen that despite checking the availability, Arvind drove into trouble.

Therefore, he/she must have a basic understanding of his/her supervisor to whom he/she needs to report. He/she must have the knowledge of the requirement of checking the current amount of stocks in the storeroom.

Reporting the malfunctioning and hazardous handling equipment to the supervisor

In the previous unit, there are certain equipment like carts, and trolleys that are used in carrying the inventories from the delivery truck to the storeroom. If the handling equipment is not in good working order, then the service fulfilments executive can bear a loss in carrying the inventories from the delivery truck to the store. Therefore, the service fulfilments executive is expected to check the working conditions of handling equipment. Only knowing the faulty conditions of handling equipment is not enough, these concerns should also be reported to the supervisor

For example, a service fulfilments executive named Arvind found that a few trollies are faulty but he did not inform Bimlesh, his supervisor, about it. When the goods arrived at the retail store, certain items were broken due to faulty trollies, while carrying the goods to the storeroom. The loss of broken items was compensated from Arvind's salary as due to his fault, the retail store was not eligible to bear these losses.

Therefore, a service fulfilments executive must check all handling equipment and keep updating the status of the equipment to the supervisor on a regular basis.

Thorough preparation of goods' receipts

The service fulfilments executive needs to make several preparations before receiving the goods:

- Clean and tidy storerooms are ensured.
- The bay areas should be cleaned enough.
- The handling equipment should be in proper working order.

Know-how of information relating to quantities and types of products

Before receiving goods, the service fulfilments executive should know the actual quantities and types of goods that are arriving. In general, the service fulfilments executive needs to have the information about the order that he/she is going to receive.

For example, a service fulfilments executive Arvind had to receive 500 units of a certain product. But he took the deliveries from the distributor salesman without having information regarding the ordered quantities of stocks. Therefore, he actually received 400 and the bill was made for 500 units of goods. At the time of complaining about the delivery of fewer amounts of products than required, the distributor salesman claimed that he only delivered 500 units. Arvind was blamed for his inefficiency in receiving the goods.

Therefore, a service fulfilments executive must have knowledge of the amount and type of goods that are ordered.

Reporting shortage of storage space to the supervisor

The storeroom of a retail store has a limited area of land and capacity. It can contain a limited amount of inventories. If the order of inventories is placed, then it is ensured that there should be storage space in the storeroom as the inventories cannot be kept outside. The service fulfilments executive needs to check the storage space and if there is any shortage, then he/she needs to report this issue to the supervisor.

Know-how of functioning of handling equipment

When the service fulfilments executive receives the goods, then he/she must have the knowledge of the equipment that assists in carrying the goods from the delivery truck to the storeroom. If he/she does not have the knowledge of the equipment, then it becomes impossible for him/her to receive the goods.

This is because it would be difficult for the service fulfilments executive to carry the goods from the delivery truck to the storeroom.

Reporting any fault in the procedure of receiving goods to the supervisor

The supervisor is given the task of supervising all activities of the service fulfilments executive that he/she is performing in the organization. There is an appropriate procedure that is followed in each organization for receiving goods. The procedures include attaining knowledge of order, checking storage space, equipment, and their functioning, etc. If the service fulfilments executive finds any fault in the entire procedure, then he/she needs to report this issue to the supervisor immediately.

Also, the storage space might contain any hazards like pesticides, etc. The service fulfilments executive should report these hazards to the concerning authority immediately.

2.4.2 Knowledge Required for Receiving Goods

While receiving goods, the service fulfilments executive must have the knowledge and understanding of a few steps. Let's see what knowledge and understanding are required for the service fulfilments executive to receive goods.

Administrative procedures required for receiving goods

In the previous unit, we have studied the required steps that the service fulfilments executive is supposed to perform while receiving the goods. The steps are inspecting the carton boxes of inventories, inspecting any one or two carton boxes randomly in order to check the condition of inventories, issuing delivery notes on the satisfaction of receiving the right amount of goods, and receiving the purchase order and inspecting goods against the purchasing order, etc. The service fulfilments executive must know these protocols while receiving the goods.

For example, a service fulfilments executive Arvind received the inventories and carried them from the delivery truck to the storeroom without inspecting any carton box. When the first carton box was opened, then there were broken inventories in the carton box. In such a case, the distributor salesman named Bijlani denied exchanging those inventories by stating that he had delivered goods in the correct working order.

In such a situation, the retail store incurred losses. Hence, the service fulfilments executive must know all basic activities relating to the goods' receipts and also perform each activity in order to avoid potential losses.

Know-how of refusal procedures

In the previous unit 2.2, we have studied the meaning of refusals and the importance of recording refusals. Therefore, the service fulfilments executive should know the entire procedure of recording refusals.

For example, a service fulfilments executive named Arvind knew that a specific distributor salesman named BCP enterprises always refused for delivering goods. Arvind did not report the refusal of the BCP enterprise. When his supervisor named Bimlesh places an order of products, then BCP enterprises gave a reply after two days that the BCP enterprise became inactive and had not been supplying goods for several months. Bimlesh then blamed Arvind that he should have noted the refusal of BCP enterprise in order to avoid the situation of empty stocks in the retail store.

Hence, a service fulfilments executive should record all refusals on a regular basis.

Knowledge required for storing goods

Besides the knowledge and understanding of goods' receipts, a service fulfilments executive should have the knowledge of storing goods efficiently.

Let's see what type of knowledge a service fulfilments executive is required to have for storing goods.

1. He/she needs to maintain the cleanliness and safety conditions during the storage of goods.
2. He/she should know the meaning of perishable goods. Also, he/she should know the basic procedures of handling perishable goods. He/she should know the temperature at which the perishable goods are generally stored.
3. He/she needs to know the lifecycle of all perishable products so that he/she can ensure the appropriate storage conditions of these products.
4. He/she should know the need of updating the number of goods stored in the storeroom.
5. He/she needs to know about the equipment that helps in storing goods.
6. He/she should know the need of installing CCTV cameras in the storeroom for knowing the actual status of goods' placement.

2.4.3 Skills Required for Receiving and Storing Goods

The skills are the abilities of an individual that help him/her to perform the concerned task effectively and efficiently. Similarly, a service fulfilments executive should have the following skills in order to receive and store goods. The required skills of the service fulfilments executive are mentioned below:

1. He/she should have the ability of reading and understand the data that tells the available amount of stocks in the retail store.
2. He/she should know how to write reports relating to the conditions of the storeroom.
3. He/she should know how to implement the instructions that are provided to him/her.
4. He/she should know the usage of gestures or passing signals where he/she is unable to communicate in another language.
5. He/she should have the ability to put questions to the distributor salesman or supervisors in order to reduce misunderstandings.
6. He/she should have the ability to set schedules relating to inspecting the storeroom.
7. He/she should know how to build effective communication relationships with the customers either the customers who visit the retail store or the customers who purchase the products with the help of a website.
8. He/she should know the impact of security breaches if the CCTV camera does not work properly.

Activity

Ask the students to write any five skills which they have presently. Ask them to describe why they should become service fulfilments executives with respect to their present skills and required skills for taking this position.

Summary ▣

- Methods used for controlling stock levels
- Advantages of stock control system Different types of products stored in a store
- Importance of managing storage space availability
- Equipments used in Retail store for receiving Goods
- Rituals Followed Out in Receiving Goods
- Usage of the delivery note
- Recording of Refusals
- Updating Stock Control System
- Confirming the Conditions of Storage Places
- Cleanliness and maintenance of storage areas
- Handling Procedures of Perishable and Non-perishable Goods
- Procedures for Stock Rotation
- Knowledge and Skills Required for Receiving Goods

Exercise ✎

1. What do you mean by stock control system?
2. Why is it not advisable for the service fulfilments executive to keep bulk stock in the storeroom?
3. What types of equipment should be in the storeroom for carrying goods from the delivery truck to the storeroom?
4. In a retail store, the service fulfilments executive places an order twice. The first order is placed in the month of February 2022 and another in the month of March 2022. The service fulfilments executive puts the stocks of February 2022 on the shelves inside the store. The customers also purchase the goods that have come in the month of February. In your opinion, which type of method is being used by the service fulfilments executive for controlling stock levels in this case?
5. In the retail store, any person can enter the bay. This is why the paths of service fulfilments executives get hampered a lot and it hinders their efficiency in carrying goods from the delivery truck to the storeroom. What will you advise the service fulfilments executive in order to tackle such a problem?
6. What do you mean by delivery note?
7. What is the procedure for issuing delivery notes?
8. Why is it important to update the stock control system when receiving goods each time?
9. The service fulfilments executive has to pay a huge cost for the inventories because one distributor salesman has been refusing for selling the goods for three months. Then, the service fulfilments executive purchases inventories at higher costs due to urgency. What will you advise the service fulfilments executive for avoiding such costs?
10. Explain how good storage conditions can be ensured in the storeroom?
11. State the difference between perishable and non-perishable goods.
12. A service fulfilments executive bears huge costs of inventories wastage. This is because the vegetables and fruits are the larger portions of the inventory of the store. Suggest some measures to the service fulfilments executive in order to save such costs.

13. Explain the types of stock rotation. Which type of stock rotation is suitable for non-perishable goods?

14. Why is it important to update the supervisor regarding each fault in the procedure of receiving goods?

15. Why is it necessary for the service fulfilments executive to update the supervisor about refusals?

16. A service fulfilments executive inspects the storage conditions once a week. But he feels hesitant in updating the supervisor about such conditions. Which type of skill is the service fulfilments executive is lacking in this case?

Notes

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Scan the QR codes or click on the link to watch the related videos

https://www.youtube.com/watch?v=jxCG9MxIoK0&t=44s

Stock management(FIFO/LIFO)

https://www.youtube.com/watch?v=r7FoV4XoAaw

Maintain stock in the retail store RFID

https://www.youtube.com/watch?v=7Ls47gOpNOA

Rotation of stock

https://www.youtube.com/watch?v=ehcjne9-Lto

POS machine use

www.bakercommunications.com/sales-training-videos.Htm

Sales training video

3. Planning and Scheduling Delivery

Unit 3.1 - Creating a Checklist of Equipment and Paperwork Required to Successfully Deliver Products to Customer

Unit 3.2 - Scheduling Deliveries that Make the Best Use of Time and Other Resources

Unit 3.3 - Receiving Legal Restrictions on Who can Receive Delivery

Unit 3.4 - Keeping Company Procedures in Check when Planning and Carrying Out Deliveries

Unit 3.5 - Customer Satisfaction and Customer Experience during the Delivery Process

Unit 3.6 - Building Rapport with Internal and External Customers

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. List the essential equipment and paperwork required for delivering products
2. Explain how the delivery schedule is prepared to save cost and time in delivering products
3. Determine the person who is legally authorized for collecting products' packages
4. Discuss the criterion of delivering products if the delivery person delivers products early or late
5. Demonstarte the scenario on handling refusal from customers for collecting product packages
6. Describe the handling techniques while unloading product packages
7. Explain how to maintain rapport with customers and raise their satisfaction levels

UNIT 3.1: Creating a Checklist of Equipment and Paperwork Required to Successfully Deliver Products to Customer

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. List the equipment essential for delivering products
2. List the important papers required for delivering products
3. Identify the important details before going for delivering products
4. Explain the criterion of understanding the delivery address

3.1.1 Equipment Required in Products' Delivery

When the Retail Order Fulfilment Assistant delivers the products, then he/she makes sure that the required obligations or duties are generally fulfilled. There is a proper sequence of paperwork and equipment that are important for delivering products. Before moving forward, let's understand why the equipment is important for an organization.

Equipment is defined as the materials or things that are used in the production or processing of any task or activity. Each piece of equipment is used either tangibly or intangibly. As far as the context of products' delivery is concerned, tangible products are majorly used like delivery trucks, papers, pens, mobile, internet, etc. The equipment helps in keeping products safe for usage. For example, the delivery trucks help the Retail Order Fulfilment Assistant to move products from one place to another. The papers and pen help in maintaining the database of products delivered. When products are packed, they require little equipment. When the products get packed, then a few types of equipment are required for transporting the products from one region to another.

Before moving forward to the concept of equipment that is actually used in the packaging and delivery of products. Let's see why the products are packed. Can't the products be delivered without packing them? As we know that the products' packaging means the activities or actions that protect the products from potential hazards like broken, fire, displacement, etc to ensure the smoother transportation and storage of products.

The products are generally packed because of the following factors:
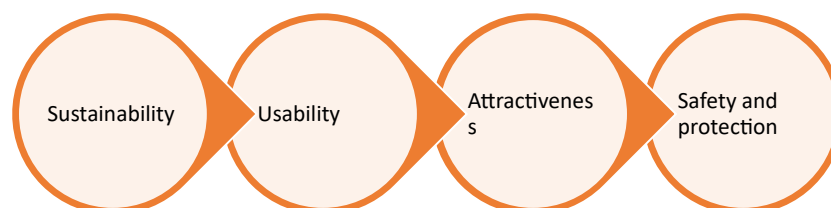
Fig. 3.1.1: Factors considered for Packaging products

Let's discuss each factor of the packaging in detail.

- **Sustainability –** Today's consumers are sharp-minded. They seek multifarious uses of one product including the consideration of the use of reusable packaging as well. The products are majorly packed in carton boxes, plastic boxes, plastic cans, paper and plastic bags, etc. They want that whatever product they receive they can use the packaging container of the products as well. This is

why the packaging helps the Retail Order Fulfilment Assistant to maintain a clean environment as well. The packaging also contributes to recycling the packaging materials as well.

• **Usability –** Consumers spend heavy money on their purchasing. They devote their hard-earned money to purchasing products for themselves. If they are not delivered the products correctly and on time, then there is no point for them to spend a lot of money on purchasing anything. Therefore, the packaging products make sure that they would receive the products worth of product quality and correct working order.

• **Attractive –** The companies use tags, different colours, different layouts, etc for packing their products. This can be seen in the market that each product is packed with different designs, layouts, shapes, etc. Each company majorly takes patents on their packing designs. The different packaging designs help the customers to identify the products at a single glance. Hence, the companies increase the attractiveness of products with the packaging materials.

• **Safety and protection –** The consumer will be satisfied only when he/she receives the products that he/she has ordered. If he/she does not find these products in the correct working order, then there is no benefit to purchasing the products. Hence, the products are kept safe with the correct packaging materials.

Let's see which type of equipment is used in delivering products.

| **Pallet –** The pallet is the bigger container that is majorly made up of cardboard. It is usually thick and bigger in size. It is used as an outer covering for the entire package of the product. | **Tape -** The tape is used to stick the papers with the pallet. Even it is used for ensuring the proper locking of the pallet. | **Bubble wrap -** The bubble wrap is actually a type of plastic bag that contains the bubbles in it. These wraps are used to ensure the products' safety. | **Package handling signs -** There are a few signs that act as a warning to the customer for handling items. |

Fig. 3.1.2: Types of equipments used for smooth packaging of products

A few important factors are often reminded to ensure the smooth packaging of products. The following factors are provided below:

1. A packing list should be kept inside the packaging pallet.

2. All products must have a separate bill labeled in which an entire description of the concerned product should be provided.

3. The labels of all products should be understandable and readable.

4. If there are multiple items in a package, then all items should be arranged so that all products can become easily visible.

5. If there are a lot of carton boxes in the package of products, then all carton boxes should be kept in a single pallet.

6. Any item that is longer in size should be kept appropriately so that it could not get broken.

7. The size of products in a package should be less than the size of the pallet.

Before moving forward, let's discuss the different logos that we can see on the packaging of delivered products.

Open here: Indicates the way of opening any container or an item.

Recycled - Indicates that the concerning product can be recycled.

Fragile - Generally put on the glass items. Indicates the danger of being broken.

Flames - Indicates that the materials can catch fire.

Upward arrows - Indicates that the carton should be opened in an upward direction.

Hands with box - Indicates that the materials should be handled with double care.

Thermometer - Indicates that the products should be stored at the desired temperature. This temperature can be hot or cold.

Keep dry - Indicates that the products should be stored in a dry place.

Protection heat - Indicates that the products should be kept away from the sunlight.
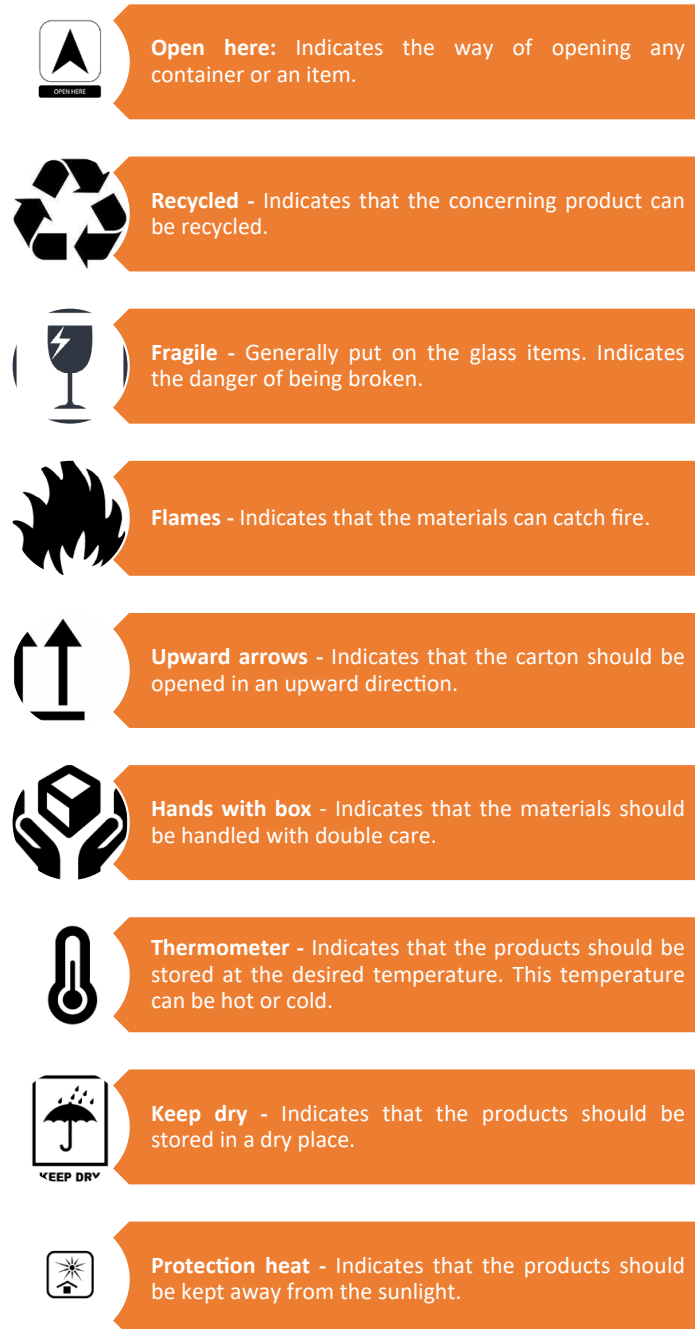
Fig. 3.1.3: Logos on packaging

3.1.2 Paperwork Required for Products' Delivery

The entire world runs on the paperwork. We can discuss all details verbally, but the paperwork becomes a tangible proof of our deals. Due to the paperwork, each individual stays stress-free as he/she gets justice over any mishappening with the product. The paperwork contains the legal validation. At the time of delivery, the paperwork is important.

A Retail Order Fulfilment Assistant can deliver products either within the country or the foreign countries. If the products are sold to the local areas, then there is a specific set of documents prepared. And if the products are sold to foreign countries, then the criterion of documentation is pretty different.

Let's look at the documentation process for both types of deliveries:

Case I: When products are delivered to the local regions	• Commercial invoice cum packing list

Case II: When products are exported to the foreign countries	• Commercial invoice cum packing list • Bill of lading • Bill of entry
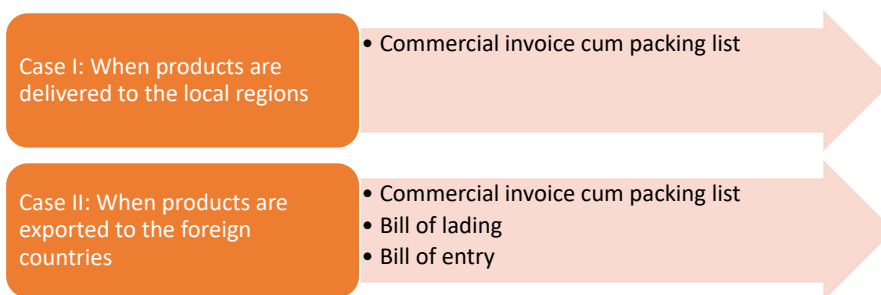
Fig. 3.1.4: Documentation process for various types of deliveries

Let's discuss each document in detail.

1. **Commercial invoice cum packing list –** As we discussed the packing list in the previous section, the packing list is one of the important documents required in product delivery. The invoice contains the description of products, types, quantities, prices of the products, etc. The packing list is generally attached to the pallet so that the customers can match the details of products delivered against the packing list.
2. **Bill of lading –** Bill of lading also serves as a similar document to the packing list. The bill of lading also contains all details relating to products received and delivered.
3. **Bill of entry –** The bill of entry is majorly issued by the exporters in which they give the declaration of the products they have actually sent. When the importer receives this bill, then he/she can verify the actual products' delivery with this bill.

3.1.3 Delivery Details Relating to the Products' Delivery

The Retail Order Fulfilment Assistant cannot deliver the products to the customers' doors randomly. The residential addresses of all customers are different. Due to this, the Retail Order Fulfilment Assistant needs to have all delivery details so that the correct package of products could be transported to the correct places.

This is why when the Retail Order Fulfilment Assistant goes for delivering the products, then he/she is supposed to have all delivery details altogether so that he/she ensures the adherence to correct delivery schedule.

Let's look at the delivery details that are required in delivering products to the customers.

Description of products that have to be delivered
Details of shipment
Details of delivery or courier partner
Details of delivery boy
Details of tracking the products' package
Details of the payment status of products' package
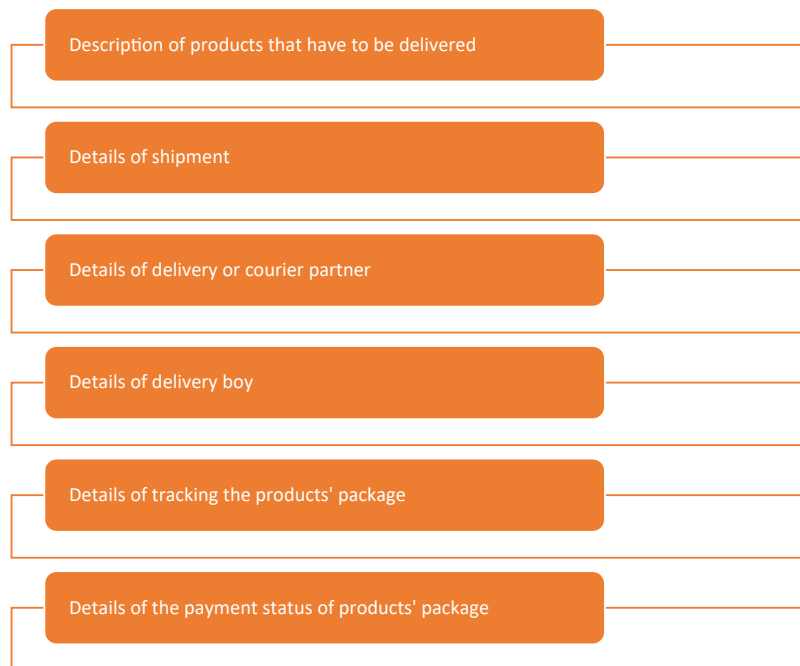
Fig. 3.1.5: Delivery details required on the delivering product

Let's discuss each delivery detail in brief.

Details of products that have to be delivered

There are several details relating to the products that the Retail Order Fulfilment Assistant is supposed to have:

1. The number of items that have to be delivered.
2. Names of items that are to be delivered.
3. Quantities of items prices paid against all items
4. Applicable taxes on products' package
5. Terms and conditions relating to the products' storage.

Details of shipment

The shipment is defined as a process of transferring products from one place to another. The products are transferred with the usage of transportation modes like delivery trucks, vans, bikes, etc. When the Retail Order Fulfilment Assistant is in the process of delivering products, then the said process is generally classified as shipment.

The shipment details contain the following information:

1. Shipment address – The location at which the products are to be delivered.
2. Products' recipient name – The person who is eligible for receiving the products.
3. Contact details of the recipient – Mobile number or telephone numbers of the person who can receive the products.

Details of delivery or courier partner

In general, the Retail Order Fulfilment Assistant does not deliver the products himself/herself, instead, he/she transfers the products to the firms that are specialized in the delivery process. These companies are generally called courier companies or delivery partners. The courier companies get the data of the delivery schedule along with the products, and then these companies deliver the products on the behalf of retail companies.

The details of delivery or courier partner include the following:

1. Name of delivery partner
2. Contact details of delivery partner
3. Office address of the delivery partner

Details of delivery boy

The delivery boy is defined as an individual that delivers products to the final customers. The following are the important details of the delivery boy:

1. Name of delivery boy
2. Mobile number of delivery boy
3. The time period in which he/she has been working with the delivery partner
4. Identification certificate of delivery boy
5. Vehicle of delivery boy that the delivery boy uses for delivering products

Details of tracking the products' package

The following are the details that are related to the tracking of products' package:

1. Order ID of the package is an alphanumeric code that is allotted to the product.
2. Track ID of the package by which the concerning package can be tracked.

Details of the payment status of products' package

The following is the information relating to the payment status of the products' package.

The package is either paid or unpaid. If the status of the package is paid, then it means that the customer has already made payments against the products' deliveries. But if the product's package is not paid, then the "due payment" of the product's package is also written on the label.

3.1.4 Ways of Getting Delivery Address

A Retail Order Fulfilment Assistant can deliver the products to the customer at any place. Each country follows a pattern of writing shipping addresses.

Mainly, the shipping address is written in the following sequence:

Name of recipient

House number

Street name or number

Name of city

Area

Postal code of the location

Name of the country

Fig. 3.1.6: Shipping address writing sequence

The delivery boy needs to locate the address by following the above sequence in descending order. Before studying the house number, the area should be tracked by looking at the postal code of the location.

3.1.5 Last Mile Role of a Delivery Boy

The delivery boy is involved in the movement of products from the warehouse to the customer's address. There are certain last mile roles of the delivery boy that he/she has to perform:

•   He/she is expected to call the customer once before his/her arrival.

•   He/she is supposed to reach the customer's address and wait for the customer patiently.

•   He/she needs to ask the customer id before transmitting product's package to the end-customer.

•   After delivery, he/she needs to seek the customers' feedbacks if they face any challenges with any activity of the retail store.

Activity

A Retail Order Fulfilment Assistant has the following orders which have to be packed separately. List the logos that must be tagged to these packages.

1.   Apples and grapes
2.   Lipstick
3.   Medicine
4.   Cup sets
5.   Leather bag

UNIT 3.2: Scheduling Deliveries that Make the Best Use of Time and Other Resources

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Explain the delivery schedule
2. Outline the criterion of drafting a delivery schedule
3. Explain the concept of fuel economy
4. Perform safe transportation and movement of products
5. Explain the concept of delivery management and key performance indicators of delivery management
6. Carry out the delivery of products at the agreed times

3.2.1 Delivery Schedule

A delivery schedule is defined as a system or a process that tells the number of orders that have to be delivered. The delivery schedule also tells the route that the Retail Order Fulfilment Assistant can take for delivering products.

The delivery schedule is a layout that is prepared for the delivery person in order to ensure the delivery of all orders by the time. This scheduling can be optimal as well as non-optimal. The optimality hereby states the capacity of using anything in judicious personnel. The delivery schedule is generally prepared personally by observing the single route and potential orders that are to be delivered. The deliveries are done with the help of transportation modes that require fuel. Therefore, the Retail Order Fulfilment Assistant cannot deliver products without a specific order. A single customer cannot be delivered products. Instead, the Retail Order Fulfilment Assistant delivers products in systematic personnel in which a lot of orders are to be delivered. But these orders generally belong to a single route. When the Retail Order Fulfilment Assistant prepares the entire schedule that contains all details relating to the deliveries, and so on, then this process is called the delivery schedule.

A Retail Order Fulfilment Assistant needs to make more than one delivery. This is why he/she has to plan the schedule of the deliveries accordingly. The delivery schedule is not prepared randomly. Instead, there is a requirement of several details for ensuring the products' delivery. The details are provided below:

Other deliveries that are to be made altogether

Deadlines for fulfilling all orders

Distance from warehouse to the delivery location

Map of delivery area

Capabilities of vehicles used for delivery purposes

Availability of the delivery person
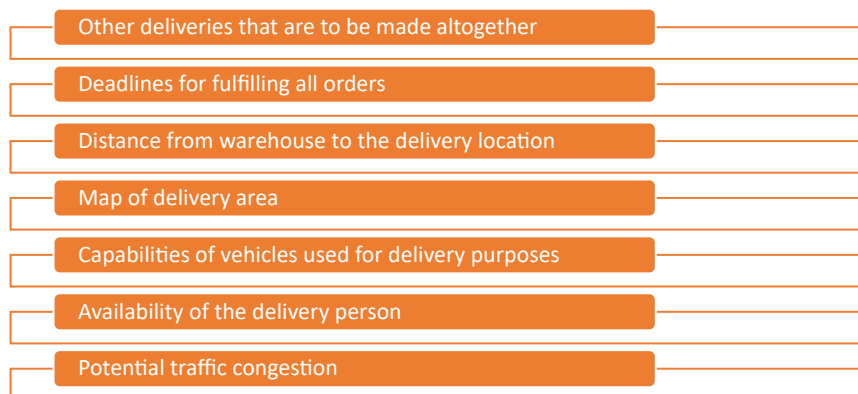
Potential traffic congestion

Fig. 3.2.1: Factors considered for smooth delivery schedule

The above-mentioned details help the Retail Order Fulfilment Assistant to draft a smoother delivery schedule that also ensures the fulfillment of all delivery orders on time.

- Several deliveries are made along with a single delivery on a single route.
- Deadlines for fulfilling orders mean the expected or last date by which the order should be delivered at any cost.
- Distance from the warehouse to the delivery location is the area lying between the ware-house from where the order is picked up and the location at which the order has to be dropped off.
- Map of delivery area is defined as the geographical regions lying within the location of deliveries.
- Capabilities of vehicles used for delivery purposes imply the speeds, fuel consumption, and loading capacity of a vehicle).
- The availability of a delivery person is defined as the availability status of a person who will deliver the orders.
- Potential traffic congestion is meant to be the stoppage and breaks lying between the dis-tance between the warehouse and delivery location.

Benefits of delivery scheduling

The delivery scheduling is beneficial to the Retail Order Fulfilment Assistant due to the following reasons:

| Reduction in delivery cost | Prevalence of reliable delivery performance | Better utilization of delivery resources | Usage of optimization technology |
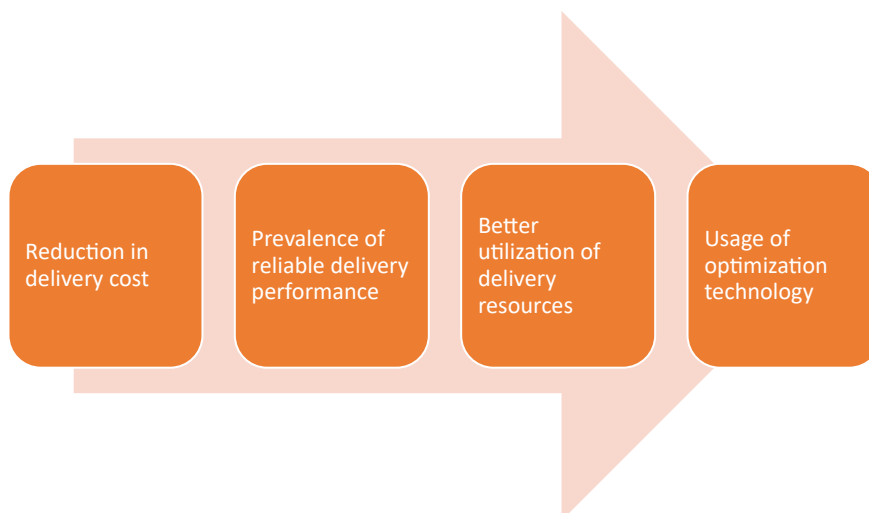
Fig. 3.2.2: Benefits of delivery Scheduling

- **Reduction in delivery cost –** A Retail Order Fulfilment Assistant tends to reduce delivery costs with the help of delivery schedules. He/she arranges all orders in a sequence that belongs to a single route. It helps him/her to deliver all orders within the same route al-together. As a result, fewer delivery costs are incurred.
- **Prevalence of reliable delivery performance –** Delivery performance is defined as the quantum of products and services sold by such personnel so that customer satisfaction can be increased. The customers get satisfied when they receive what they have ordered on time in a product working order. When the delivery schedules are prepared, then the chances of mishandling orders get reduced. In such a scenario, the delivery performance gets improved.
- **Better utilization of delivery resources –** A Retail Order Fulfilment Assistant requires several delivery resources like the delivery truck, carts, carriage, fuel, etc. The delivery resources incur certain monetary expenses. This is why the Retail Order Fulfilment Assistant should make sure that

the delivery resources should be utilized with efficient personnel.

• **Usage of optimization technology –** With the help of optimized technology and software, a customer can be notified about the delivery status and location of his/her delivered orders. In such a scenario, the customers can raise any query when they want. Also, the Retail Order Fulfilment Assistant can update the actual status of delivery as required. Hence, the consequences of all delivered products rise

Drafting delivery schedule

There are certain steps followed in the process of drafting the delivery schedule. The following steps are mentioned below:

Identifying available time for completing each task

Schedule orders as per priority

Better communication with customers

Analysis of final performance and results

Fig. 3.2.3: Process of drafting the delivery schedule

The description of all steps is provided below:

1. **Identifying available time for each task –** Each task is performed in a certain span of time. The time span can be of a few minutes, hours, days, months, or years. In the con-text of deliveries, there are a lot of activities like loading delivery trucks, driving time, traffic congestion, etc. Therefore, a Retail Order Fulfilment Assistant is required to calculate the total time that is generally spent in performing each task.

2. **Schedule orders as per priority –** Each order has a certain delivery date. It is expected to deliver each order by a certain date or deadline. A Retail Order Fulfilment Assistant has multiple orders that cannot be delivered within a single day. The deliveries take time and therefore it is important to make a list of deliveries in a sequence with respect to their priorities.

For example, there can be a lot of delivery priorities like same-day delivery, international delivery, standard delivery, and 7-day free delivery. Hence, the priority list of delivering orders is also prepared for such personnel.

1. **Better communication with customers –** A Retail Order Fulfilment Assistant can communi-cate with the customers with the presence of appropriate details when he/she has an ap-propriate delivery schedule.

2. **Analysis of final performance and results –** The most expensive resource in today's world is time that is scarce. The delivery schedule is prepared for a certain time period. If any delivery person delivers an order within the time span of the delivery schedule, then it means that the delivery person has successfully achieved the targets and the Retail Order Fulfilment Assistant can increase the workload for that delivery person.

3.2.2 Fuel Economy for Delivering Products

A Retail Order Fulfilment Assistant cannot deliver products without using vehicles. The vehicles used for delivery purposes can be trucks, bikes, cars, vans, etc. All of these vehicles cannot run without consuming sufficient amount of fuel. It can be said that the delivery vehicle requires repair and maintenance once within a time span of a year or six months. But fuel is required every day. Therefore, the Retail Order Fulfilment Assistant needs to ensure that there must be a sufficient amount of fuel available in the vehicles of the delivery person.

Here the common question arises whether the retail store provides the delivery vehicle to the delivery person or the delivery person needs to arrange the vehicle by himself/herself. The scenarios in both types are pretty different. If the delivery person makes deliveries with his/her own vehicle, then the delivery criterion is different. And if the deliveries are made with the store's vehicle, then the processes of fuel financing are different. Let's consider both cases for a better understanding.

Case I: If the delivery person gets the vehicle from the store

If the delivery person is provided a vehicle for delivering products, then the store refills the petrol tanks of vehicles with respect to the estimated distance between the warehouse and delivery locations. We have studied that the delivery schedule also contains the estimated distance that is majorly covered between the warehouse's location or delivery location.

Each vehicle has its own mileage. The mileage is defined as the number of kilometers a vehicle covers within one liter of fuel. The know-how of mileage provides a rough idea of fuel consumption that the vehicle undertakes in covering a certain amount of distance.

We have discussed that the Retail Order Fulfilment Assistant drafts the delivery schedule in which he/she enlists all orders that can be delivered within a single route. Hence, he/she also decides the quantities of fuel that would be consumed for making the concerning delivery. With respect to the consideration of details of vehicle mileage, age of the vehicle, the distance that has to be covered, delivery locations, traffic congestion, etc, the Retail Order Fulfilment Assistant inserts fuel into the vehicle.

Now it can happen that the delivery person has to drive a few extra miles due to non-finding of actual shipping location or the delivery person gets stuck in the heavily loaded traffic. In such a scenario, the fuel in the vehicle's tank would be less than required. Therefore, the delivery person would refill the fuel by him/herself and take a receipt of fuel. Afterward, he/she would show this receipt to the Retail Order Fulfilment Assistant. The Retail Order Fulfilment Assistant would get the reimbursement of fuel against the receipts. Let's understand with the help of an example.

A Retail Order Fulfilment Assistant observes that the vehicle requires five liters of petrol for making the deliveries on a day by considering all factors. The highway that the delivery person needs to take for covering a distance undergoes construction. Due to this, the delivery person has to take another path of reaching the shipping location. The mentioned path is quite lengthy. Now the fuel in the vehicle's fuel tank is insufficient for making all deliveries. In such a situation, the delivery person refills the fuel tank and gets the receipt from the petroleum booth. Then, he submits the receipt to the store and the retail store gives the reimbursement to the delivery person. With respect to such events, the sudden requirement for fuel can be fulfilled.

Case II: If the delivery person does not get the vehicle from the store

In a few retail stores, the Retail Order Fulfilment Assistant does not provide the delivery vehicle to the delivery person. Instead, the delivery person has to bring his/her own vehicle. In such a situation, the retail store either provides the cost per kilometer covered or pays the price on each package delivered.

The retail store can adopt either one of both approaches.

For example, there are two types of retail stores A and B. Both retail stores ask the delivery person to bring his/her own vehicle for making deliveries of goods.

Retail store A pays the price of Rs. 3 on each kilometer covered. For example, if the delivery person covers a distance of 30 km in a day, then the delivery person is paid Rs. 90 for the fuel reimbursement.

Retail store B pays the price of Rs. 20 on each order. Therefore, if the delivery person delivers 25 packages in a day, then he/she is paid Rs. 500 as the payment.

In this case, the retail store does not consider the fuel consumption, instead, it pays the fixed price on each package or each kilometer covered.

3.2.3 Safe Transportation and Delivery of Goods

The retail store can provide the delivery schedule to the delivery person for making deliveries, but merely delivering goods is not enough. Instead, the retail store, Retail Order Fulfilment Assistant, and delivery persons are held responsible for making all deliveries on time and safely. If the products get broken in transit, then there is no benefit of making deliveries faster. The products that are getting delivered should be transported safely so that any chance of mishap could not exist. The concept of delivery management covers the entire context that is getting covered in the concerning topic. Let's discuss the concept of a delivery management in depth.

The delivery management is defined as a process in which all activities are performed to ensure the delivery of products with effectiveness and efficiency. This management ensures the scenario of perfect delivery of products.

The delivery is also a process that interacts with the customers directly and increases the chances of repetitive purchases of customers. Delivery management is sometimes called dispatch or fleet management. The delivery management could be carried out by any of the following people:

| Delivery manager | Dispatch personager | Logistics personager |

Fig. 3.2.4: Delivery management can be carried out by following people

Importance of delivery management

Delivery management is important as it retains the customers. The customers are nonetheless gods to the retail stores. When the customers come and place orders, then the sales volume of the retail store increases, and henceforth, the profit levels also rise. Therefore, the customers are proven as the most important asset for all retail stores. Not only retail stores, but the customers are also important to all types of businesses whether the businesses offer products or services.

Key performance indicators of delivery management

The key performance indicators facilitate help in getting know-how of the delivery management system. These indicators provide the current status of deliveries of products and services. There are several key performance indicators of delivery management that help in validating whether the goods are delivered in the correct order or not.
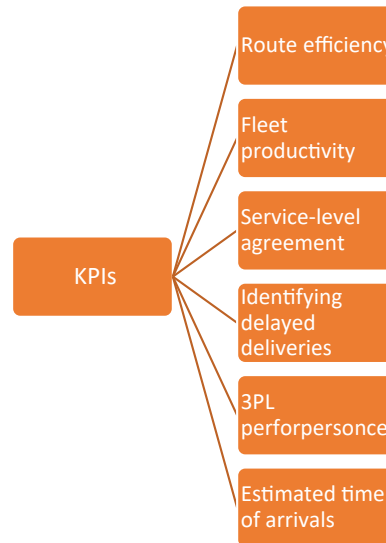
Fig. 3.2.5: KPIs for delivery management

The following KPIs of delivery management is provided below:

1. **Route efficiency –** Route efficiency is termed as the process of searching for the most cost-efficient route for covering the distance between warehouse and shipping locations. The route efficiency is generally meant to be the style of finding the easiest path to reach the delivery location. Route efficiency involves several factors like driver schedules, traf-fic patterns, delivery windows, delivery routes, vehicle capacity, etc. With the considera-tion of such factors, the Retail Order Fulfilment Assistant finds the easiest and most suitable path for reaching the delivery location.

2. **Fleet productivity –** The fleet is defined as a group of vehicles that just come out of the garage to deliver orders. Each fleet is dispatched at a certain point in time and then it comes back once all orders get delivered. A Retail Order Fulfilment Assistant expects that the fleet could make maximum numbers of deliveries altogether. There are several factors that are undertaken in accessing fleet productivity are driver behaviour, idle hours of the fleet, vehicle maintenance, fuel usage, etc.

3. **Service-level agreement –** When a delivery person is assigned to make deliveries to the customers, then a service-level agreement is prepared. This agreement contains the de-tails of customers and notifies the customers when any type of delivery inefficiency aris-es. In such situations, the customers are always notified of the current status of their packages.

4. **Identifying delayed deliveries –** The Retail Order Fulfilment Assistant needs to have the know-how of the delayed deliveries so that the extent of perfect deliveries could be known well. As long as the number of delayed deliveries would be lesser, then the scenar-io of perfect deliveries persists.

5. **3PL performance–** A Retail Order Fulfilment Assistant also provides the tasks of deliveries to third parties. In such cases, the tasks of product deliveries are outsourced. Shipping accu-racy, order accuracy, etc are a few factors considered for accessing the 3PL perfor-mance.

6. **Estimated time of arrivals –** The estimated time of arrivals is defined as the estimated minutes taken by the delivery person in arriving at the shipping location. The ETA can be calculated with the help of several data observations like vehicle characteristics, road networks, traffic conditions, unforeseen events, etc.

The above-mentioned metrics are calculated routinely. These metrics provide the know-how of the scenarios whether the products have been delivered or not.

Advantages of delivery management

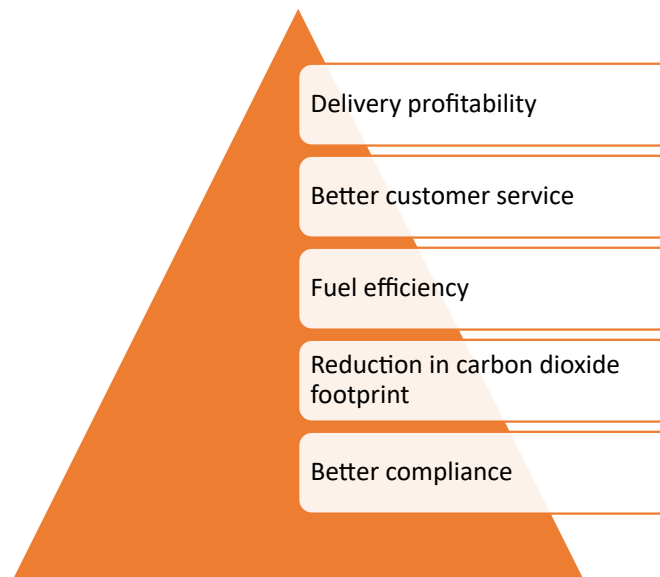Let's discuss the advantages of delivery management in detail.

Fig. 3.2.6: Advantages of delivery management

1. **Delivery profitability –** With the help of a delivery management system, the service ful-fillment executive finds the route that seems to be the cheapest and most effective one. Then, the delivery management system ensures the savings of huge profit margins. This further helps the business company to retain larger amounts of profits.
2. **Better customer service –** The delivery management system ensures that the customers get their orders delivered in the least possible time. As a result, the customers stay con-tented. Increasing customer satisfaction indicates the provision of better customer ser-vices.
3. **Fuel efficiency –** The fuel incurs a few cost that facilitates running the delivery vehicles. Since the fuel cost deduces the profit margins of the retail stores. Therefore, the Retail Order Fulfilment Assistant needs to make successful deliveries by consuming less fuel. Thus, the saving on fuel consumption becomes the major saviour of retail stores to reduce the delivery cost.
4. **Reduction in carbon dioxide footprint –** The Retail Order Fulfilment Assistant also needs to think of the social aspect while making product deliveries. If the delivery vehicle runs ex-tra miles for transporting products, then it is proven as a pollution-generating activity for the environment. This is because the vehicle's engine releases carbon dioxide due to the burning of fuel. If the delivery vehicle runs less, then the fewer carbon dioxide gets emit-ted into the atmosphere.
5. **Better compliance –** The delivery management system contains all information relating to the products' deliveries, then all formalities relating to the products' deliveries get ful-filled. Hence, the entire list of compliances gets fulfilled.

3.2.4 Different Types of Retail Deliveries

The following are the various types of retail deliveries:

1. Counter delivery (goods are packed and delivered to the customer's vehicle at the store post purchase)

2. Door Delivery - Door deliveries are done within the policy of the company for products that the customers' request for door delivery.

3. Online order delivery: Items purchased online are delivered at the doorsteps of customers

4. Online orders and Curbside Delivery / Pick up: Curbside Pickup is a delivery service that allows customers to pick up their packages from convenient locations like the parking of the local stores or the dedicated pathway in the stores for picking up the delivery. When using curbside pickup customers do not have to get off their vehicles. The payment is also made online and is paid for before the order is picked up.

5. Contactless Delivery: The process of shipping and order and leaving it for the customer without contact between individuals. For delivery, this is usually done by leaving the package at the curb or at the door.

6. On-Demand Delivery: This is the process of fulfilling orders from checkout to delivery within a matter of hours. Offering an on demand delivery option provides a competitive customer service, but like other same-day shipping and delivery options, requires streamlined and automated processes for it to be both reliable and profitable.

3.2.4 Delivery of Products at the Agreed Times

When the customers place an order of the products, then the customers expect that they would be receiving the products on time. This is because all customers plan out their tasks and activities at their own discretion. The delivery management system notifies the customers about their order arrival, then the customers are expected to stay at home for receiving the package. Or they plan to make anyone stay for receiving the packages. In such situations, the Retail Order Fulfilment Assistant is expected to schedule the deliveries and make sure that the delivery person delivers products at the said time.

If the delivery person is unable to deliver products to the customers, then customers generally get irritated and then decide not to place any order further.

The customers could have plans of going out, in this situation the Retail Order Fulfilment Assistant should not enforce his/her own-prepared delivery schedule. This is because the customer cannot postpone his/her already drafted plans for the sake of receiving packaged order. Due to such scenarios, the customer often feels hesitant to place orders because the customer is unwilling to postpone any plan due to the delivery packages. Therefore, the customer should be given the choice of choosing the delivery time that suits him/her the best. In such a situation, the customer remains content with the delivered packages.

In a few circumstances, the customers go through sudden plans like any emergency meeting, emergency visit to the hospital, etc. Anything can come to the customer all of a sudden and the Retail Order Fulfilment Assistant cannot question the customer about such plans. But the time is limited to everybody whether it is a customer, a delivery person, or a Retail Order Fulfilment Assistant. Both parties should respect each other's time appropriately. Therefore, the customer should be given a choice of rescheduling the delivery time one day prior to the delivery date so that the timeline of the delivery person and the customer can be respected equally.

Activity

A Retail Order Fulfilment Assistant has to deliver products to these five places within a single state. These places are the following:

The delivery has to be made within Delhi. These are the following places existing within Delhi, 110032:

Mayur Vihar

Vivek Vihar

Vishwas Nagar

Krishna Nagar

Gorakh Park

Analyze the locations of all delivery outlets. Prepare the delivery schedule with respect to all locations.

UNIT 3.3: Receiving Legal Restrictions on Who can Receive Delivery

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe the process for determining a customer's eligibility to pick up the product packages lawfully
2. Follow the company procedures for identifying the correct delivery recipient

3.3.1 Legal Restrictions on Delivery

The context of legal restrictions on delivery is quite common. This is because the delivery person cannot deliver products to any random person. If the customer places an order of the products, then his/her order is considered as a part of his/her personal sphere of life. Thus, these spheres cannot be handed over to any person. The result is that a sort of legal restriction is imposed on the delivery person that he/she cannot hand over the package to anyone without informing the customer.

Before moving forward, let's understand the basic concepts that help in understanding this unit effectively.

The delivery recipient is generally defined as an individual who places an order for the package and remains eligible to receive the delivery of a package. The delivery recipient is often mentioned in the details of deliveries. The concerning details are also given to the delivery persons. The delivery recipients are mentioned in order to remove all doubts relating to the deliveries.

The delivery recipient is the legal person who can receive the delivery of the package. But what happens if the delivery recipient is not at the delivery location? Think of the situation when the delivery person hands over the package to the person staying at the delivery recipient's address without recording the customer's absence, and the customer files a complaint about not getting the order. Also, think of the situation when the package of the delivery recipient is handed over to the person who would turn out to be the thief who himself has come to the location for stealing things.

In such circumstances, the customers could come up with several queries like the mishandling of the packages, unethical practices of not getting orders despite making full payments against the orders, etc. The Retail Order Fulfilment Assistant is held responsible for resolving all queries of customers. The mishandling of packages, wrong deliveries, etc generally increase the problems for the Retail Order Fulfilment Assistant as the profit margins are hampered by the larger extents.

Therefore, Retail Order Fulfilment Assistants majorly need to follow all company procedures for handling such issues. Handling such issues help in lessening the burden of rising costs and start affecting profits positively.

The company procedures of each retail store can be different but there are a few common practices that each store can adopt in order to ensure that the packages are delivered to the right person only.

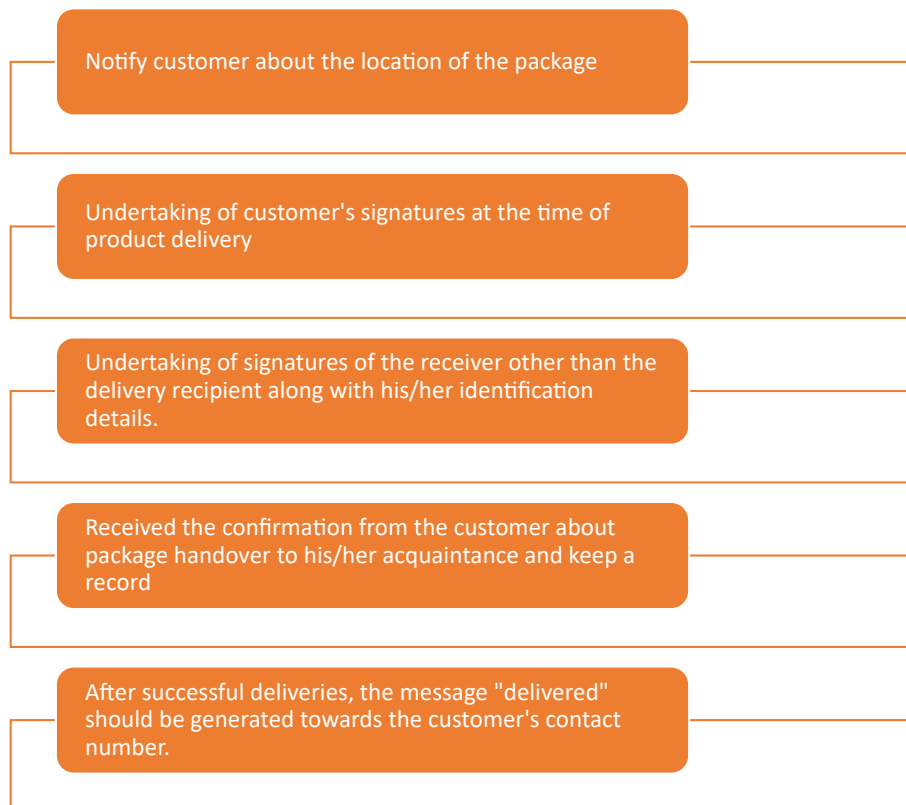The following company procedures are provided below:

Notify customer about the location of the package

Undertaking of customer's signatures at the time of product delivery

Undertaking of signatures of the receiver other than the delivery recipient along with his/her identification details.

Received the confirmation from the customer about package handover to his/her acquaintance and keep a record

After successful deliveries, the message "delivered" should be generated towards the customer's contact number.

Fig. 3.3.1: Product delivery process

Let's discuss each procedure in detail.

Notify customer about the location of the package

Each customer wants to get alerts on the status of the package that he/she has ordered. The customer's package is pretty confidential and personal to him/her. This is why they do not expect any kind of mishandling of the package. Therefore, the Retail Order Fulfilment Assistant should make the delivery management system in such personnel so that the customer could get the notifications regarding the location of the package on a continuous basis. This assures the customer too that his/her package is in safe hands and on the way. Also, the customer generally pays money against the order in advance. The advance payment scares the customer whether his/her money would not get drowned up. Therefore, the customers stay contented and calm.

1.   **The undertaking of customer's signatures at the time of product delivery**

When the products get delivered, then the Retail Order Fulfilment Assistant asks the delivery person to get the signatures of the customers. The signatures can be tangible as well as electronically. The signatures state that the customer is confirming that he/she has received the package.

Now the question arises of what the pattern of the signature should be. The signature should be received on paper or electronically, dependent upon the technology and approach that the retail store is using.

Let's look at both scenarios and discuss them in detail.

Scenario I:

When the delivery person delivers the products to the customer's shipping location, then the delivery person hands over the package to the customer and gets the signatures of the customer on the copy of the delivery schedule's sheet. The customer confirms by giving the signatures that he/she has received the ordered package.

Scenario II:

The second scenario is the situation when the deliveries happen with the standard procedure that is discussed above. This is not always important that the customers' signatures are only received on paper, instead, the signatures can be received in an electronic mode. The context of e-signatures can be adopted by the delivery person anytime.

There is a real-life experience associated with e-signatures. When the pandemic occurred, then the delivery person generally gets the confirmation of delivery online. Rather the consumer would get the text message on his/her phone where he/she is required to submit the e-signatures. The e-signatures would be updated on the retail store's software and automatically get added to the database of products' deliveries. This confirms that the consumer has received the package.

Or

The configuration of the delivery person is done in such a manner that when he clicks on the order id of the customer to whom he/she is delivering products. Then, the system auto-generates the "one-time password" for the delivery that is barely operational for the next thirty minutes. Once the one-time password is inserted into the system, then the auto-confirmation is received from the customer itself.

2. **The undertaking of signatures of the receiver other than the delivery recipient along with his/her identification details**

   Sometimes, when the delivery man goes to the delivery recipient's address, then the delivery recipient is not found at home. In such case, the delivery person cannot give the package to any person at random or the delivery person cannot return without delivering the products. Therefore, the delivery person needs to hand over the product to someone suggested by the customer, like a neighbor, society guard etc.. It is standard process to give that package to the customer's acquaintance after asking the customer himself/herself.

   The delivery person cannot come back just after giving products to the customer's acquaintance without bringing any proof of delivery. Therefore, the delivery person needs to ping a call to the customer whether he/she can deliver products to his/her acquaintance whosoever is receiving the products. If the customer agrees, then the delivery person should hand over that product to the customer's acquaintance and take the acquaintance's signatures on the delivery schedule sheet. Even the delivery person should also get any one of the identification details for future reference. Thus, the customer would be ensured that his/her packaged order has been successfully delivered.

3. **Received the confirmation from the customer about package handover to his/her acquaintance and keep a record**

   After taking all details of the receiver, the delivery person should also note that any acquaintance of the delivery person has collected the packaged order. Also, the delivery person should make a record of the same in order to resolve the queries, if arise in the future.

4. **After successful deliveries, the message "delivered" should be generated towards the customer's contact number.**

   In nearly 50% of the incidents, the packaged order is not collected by the customer himself/herself. This is because it is not always necessary that the customer who has ordered would receive the order. The customers do not call their acquaintance again and again whether they would have received their orders on their behalf. Therefore, they should be notified of a message "delivered" to each customer through a text message once the order has been successfully delivered. This assures that the customer's order has been reached at his/her shipping location with appropriate verification.

Activity

Role play:

A delivery person gets late in delivering products. The customer is anxious due to non-collecting products' deliveries. Make a pair of two people and draft the conversation between the two people in which one person would be the Retail Order Fulfilment Assistant and another person would be the end customer.

UNIT 3.4: Keeping Company Procedures in Check when Planning and Carrying Out Deliveries

Unit Objectives

By the end of this unit, the participants will be able to:

1. State the importance of on-time delivery of products
2. Discuss the impacts of early delivery of products
3. Identify the scenarios of late delivery of products
4. List the potential causes of late delivery of products
5. Discuss the impacts of late delivery of products
6. Describe the method of dealing with the late deliveries of products

3.4.1 Planning and Carrying-out Deliveries

In the direction of making deliveries, the Retail Order Fulfilment Assistant can undergo any type of issue. The issues can be undelivered packages, early or late arrival of packages, wrong deliveries, etc. The customers are worshipped in each outlet. This is because the customers are the clients that are developed by the sales team for generating profits. If the customers suffer any type of problem, then they generally switch to other outlets for placing orders. This hampers the potential profit margins of the retail store. This is why the Retail Order Fulfilment Assistant tries hard to serve the customers with utmost efficiency so that all customers stay satisfied with their orders.

It is advised to the Retail Order Fulfilment Assistants for making better plans to deliver products of better quality by the agreed timelines. This ensures the customers that the concerning retail stores are serving better types of services and products to the customers.

The above-mentioned issues can occur anytime. There are a few company procedures that are generally followed in planning and carrying out deliveries. These procedures bring consistency to the operations of the retail store with the dimension of efficiency and effectiveness.

The Retail Order Fulfilment Assistant is supposed to deliver the products on time. The on-time delivery is termed as the situation when the products are delivered to the customer on the agreed time.

The on-time delivery is important because:

| Higher customer satisfaction |
| Professionalism |
| Reduction in wastage |
| Adherence to legal guidelines |

Fig. 3.4.1: Benefits of on time delivery

- **Higher customer satisfaction –** When the customers are delivered products timely, then they generally become more satisfied in purchasing products and services. Hence. Cus-tomer satisfaction rises to a larger extent.
- **Professionalism –** Timely delivery of products represents the punctuality of an individual. Punctuality is defined as the scenario in which an individual performs all activities on time. Therefore, the punctuality of a delivery person seems to be the professionalism of a deliv-ery person as well as the retail store the delivery person belongs to.
- **Reduction in wastage –** Each product has its own expiry date. When the products are or-dered, then the Retail Order Fulfilment Assistant makes the delivery schedules. The delivery schedules also consist of the details of products that have to be delivered. The delivery schedule is prepared on the basis of the expiry date of the products. The products can be perishable as well as non-perishable in nature. If the products are perishable in nature, then the products may get expired before making actual delivery.
- **Adherence to legal guidelines –** The legal framework of the country also put certain legal obligations on the retail stores that they need to deliver products by the said time. If the delays happen in the product's delivery more than justified range, then the retail store be-comes compelled to provide refunds to the customers.

While delivering products, the Retail Order Fulfilment Assistant experiences three types of problems which are provided below:

Fig. 3.4.2: Types of problems faced by Retail Order Fulfilment Assistant

Let's discuss each issue in-depth for more understanding.

3.4.2 Early Delivery of Goods

The early delivery of goods is defined as the scenario when the delivery person supplies products to the customer prior to the agreed date of delivery.

- When the customer places an order of the products, then the following sequence is performed for ensuring the delivery of products.

Fig. 3.4.3: Sequence after customer places an order of the products

1. **Receiving the customer's order**

    When any customer places an order of the products, then it becomes the choice of the store either to accept or reject the order. If the store accepts the order, then the store becomes liable for delivering the products. Or if the store denies the order, then it is notified to the customer right away at the time of order placement. On the eve of the order's denial, the customer can look out for the product from a different retail store.

2. **Fulfilling the customer's order**

    *   When the Retail Order Fulfilment Assistant receives the orders of customers, then the Retail Order Fulfilment Assistant processes the orders. The customer's order is filled with the help of three stages:

    *   Firstly, in the direction of processing the customer's orders, the products are first taken out of the warehouse. The warehouse acts as the storage house of products of the retail store.

    *   After retrieving all products out of the warehouse, the products are packed in a proper package.

    *   Once the package is packed appropriately, then the package is shipped to the delivery location through the delivery truck.

3. **Performing after-sales activities**

    After the occurrence of actual sales, there are certain activities that are performed after-sales. These activities include refunds, return of orders, etc.

Fig. 3.4.4: Stages of customers Order

Impacts of early delivery of products

The following points showcase the impacts of early deliveries of products:

*   **Customer satisfaction –** When the products are delivered early, then the satisfaction levels of customers get flipped by 360-degrees instantly. The customers become delighted if their orders arrive early as compared to the estimated delivery date. The customers show their happiness by giving good reviews to the retail store and delivery person.

*   **Customer retention –** Customers have a prior belief that their orders arrive on time. Whenever they place an order of the products next time, then they generally have an opinion that they would be receiving the products by the expected delivery date at the maximum. They generally plan their shopping accordingly. This helps the Retail Order Fulfilment Assistants to retain the customers.

*   **Increasing brand loyalty –** If the products are delivered to the customers on an early basis, then the customers keep purchasing the products of the same product provider. In such a case, the brand loyalty of customers generally increases to a larger extent.

3.4.3 Late Delivery of Products

The late delivery of products is termed as the situation when the products are delivered to the customers after the estimated delivery date. The late delivery of products is always considered a negative situation for each retail store. The situation of late delivery of products creates a problem for the retail store, a delivery person as well as the Retail Order Fulfilment Assistant.

The late delivery of products generally frustrates the customers and this frustration put a negative impact on them. They are less likely to place the order of the products with the retail store that has delivered the products to him/her lately than the estimated delivery date.

Responsible person for late delivery of products

When the products are delivered late, then the two people undertake the responsibility of delivering products very late than the estimated delivery date. These two people are majorly;
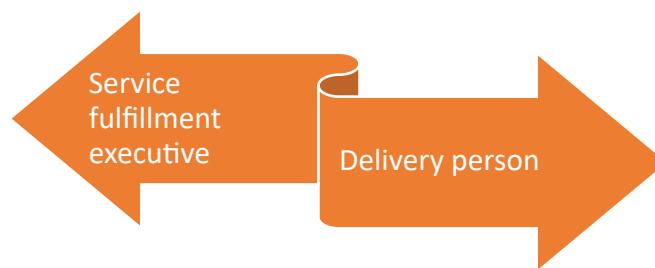
Fig. 3.4.5: People responsible for late delivery of products

If the products are delivered late, then either the Retail Order Fulfilment Assistant or the delivery person is held responsible for the late delivery of products. No person other than these two listens to anything from the customer for late delivery of products.

Causes of late delivery of products

There are innumerable cases of the late delivery of products to the customers. A few causes are provided below:

Mistakes in documentation activities

Packaging issues

A hike in delivery volume

System failure

Natural causes

Fig. 3.4.6: Causes for late deliveries

Let's discuss each cause in depth.

1. **Mistakes in documentation activities –** When the packages are transferred to the courier company, there are a lot of documentation activities relating to the courier services. The documentation contains a list of all types of possible information like contact details, shipment location, details of the delivery person, etc. If any of these details are not available or the information has errors, the delivery deadlines can get impacted. For example, one package has to deli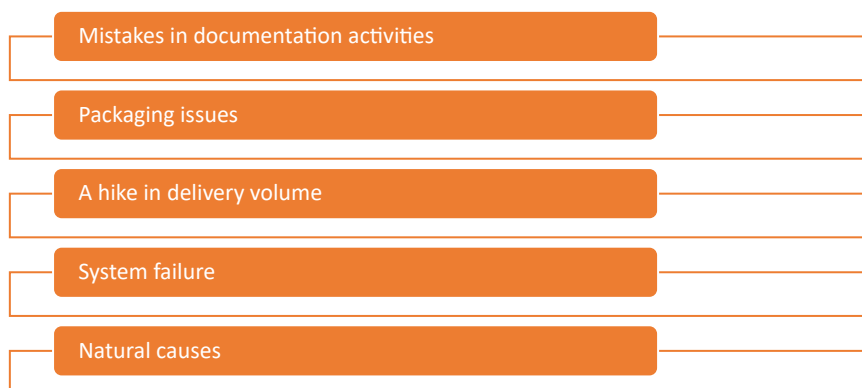ver to the location "Maujpur, Delhi - 110053, but this package is mistakenly noted as "Maujpur, Delhi – 110032". In such a situation, when the delivery person goes to deliver the products, then the delivery person finds "Maujpur" in Delhi – 110032, instead the shipping location would be found in the pin code of Delhi – 110053. Due to such mistakes, the packages could not get delivered to the customer at the agreed time.

2. **Packaging issues –** The products are packed in an effective manner. Sometimes, the products are not packaged as per required standards, then the products may spoil or break in transit. In such situations, the customers are unwilling to accept the deliveries. Therefore, the products' deliveries become late.

3. **A hike in delivery volume –** Due to the prevalence of a few occasions like Diwali, Holi, etc in a country, the traffic volume in the city stays pretty higher. Or, due to the higher demand for products in these time spans, there are fewer or no products available in the warehouse. In such situations, the product's deliveries often become late.

4. **System failure –** Customers are supposed to place their orders through websites. The website can undergo the stage of system failure at any time. In such situations, either the customers could not place the order of their products or they order the products, but their details could not get updated on the backend. Due to this, the technical team of the retail store could not get the notification of orders. In this mishap, the deliveries often become late.

5. **Natural causes –** Natural causes are not in the hands of people. Mother nature cannot be predicated appropriately. The natural causes hinder the smoother process of delivering products accurately. Therefore, when the country is hit by natural causes like heavy rainfall, earthquake, etc. In such situations, it is the ethical and moral duty to save mankind. Therefore, the delivery persons and other people working in the retail sector are also part of mankind. Hence, this is also one of the several causes of product deliveries.

Impacts of late deliveries of products

Every person has twenty-four hours in a day. Each of us wants to utilize our days at the best. Therefore, the customers want that the seller respects their time too. If they receive late delivery of products, then they often become frustrated and it may increase the chances of the retail stores losing the customers.

The late deliveries often badly impact the customer retention. The customers are less willing to become loyal customers of the retail store. There are several key metrics that help in calculating the customer retention rate.
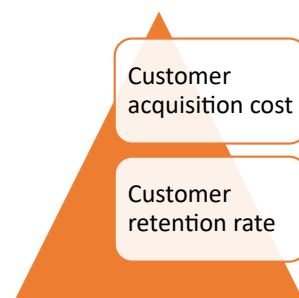
Customer acquisition cost

Customer retention rate

Fig. 3.4.7: Impact of late deliveries

Let's discuss each matrix in the depth of the understanding.

Customer acquisition cost

The customer acquisition cost is termed as the cost incurred by the seller in convincing the customer to buy the specific product or service. This cost often involves the advertisement cost, cost realized in sales and market, etc.

Let's understand this cost with the help of an example.

If the retail store spends Rs. 20000 in convincing 2000 customers. Then, the customer acquisition is calculated as;

$$Customer\ acquisition\ cost = \frac{Total\ expenditures\ paid\ in\ convincing\ the\ customers}{Number\ of\ customers\ convinced}$$

$$Customer\ acquisition\ cost = \frac{Rs.\ 20000}{2000}$$

$$Customer\ acquisition\ cost = Rs.\ 10$$

Customer retention rate

The customer retention rate is termed as the extent of customers that are successfully kept by the seller by the end of the year. This rate is measured in the terms of percentages.

Let's understand the customer retention rate with the help of a better example.

A retail store has 500 customers at the beginning of the year. By the end of the year, the store remains successful in retaining 400 customers by the end of the year. In addition, the store becomes successful in adding 50 more customers. Therefore, it can be said that the store has 450 customers by the end of the year. Thus, the customer retention rate is calculated as;

$$Customer\ retention\ rate = \frac{Total\ customers\ at\ the\ end\ of\ the\ year - New\ customers\ added}{Total\ customers\ at\ the\ beginning\ of\ the\ year} \times 100$$

$$Customer\ retention\ rate = \frac{450 - 50}{500} \times 100$$

$$Customer\ retention\ rate = \frac{400}{500} \times 100$$

$$Customer\ retention\ rate = 80\%$$

There is another measure that expresses the impacts of late deliveries of products. The statistics of retail store shows that the number of retained customers keeps declining as long as the products are delivered late to the customers.

Dealing with late deliveries of products

There are several ways that help the retail store in dealing with the late deliveries of products. The ways are given below:
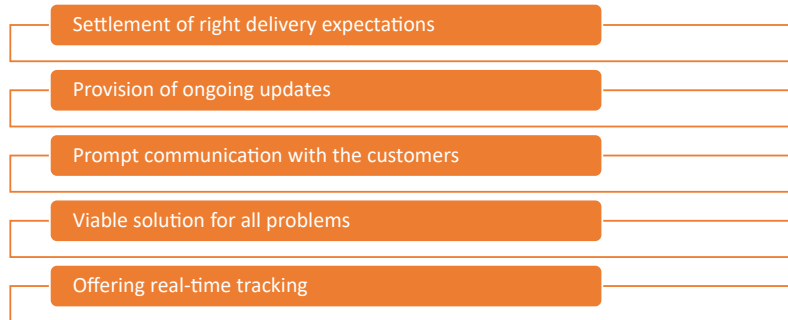
| Settlement of right delivery expectations |
| Provision of ongoing updates |
| Prompt communication with the customers |
| Viable solution for all problems |
| Offering real-time tracking |

Fig. 3.4.8: ways of dealing with late deliveries

1. **Settlement of right delivery expectations –** Customers often gets frustrated with things when they do not receive the delivery of their packaged order. They do not expect that the retail store delivers the packages within a day or two days, instead they just expect to get the products delivered by the committed time that the retail store would offer. Therefore, a Retail Order Fulfilment Assistant prepares the delivery schedule and lines up the deliveries accordingly.

2. **Provision of ongoing updates –** Once the customers place the order, then they are generally eager to know everything relating to the location of their product and the delivery schedules. When the customers are provided regular updates, then if a little delay occurs in delivering the product, then there is no bigger issue in that. This is why the customers know the actual location of their packages.

3. **Prompt communication with the customers –** In the process of product delivery, the Retail Order Fulfilment Assistant gets to know the status of the package location and its delivery process. Therefore, he/she needs to make a system so that all messages could be promptly transferred to the customers.

4. **A viable solution for all problems –** The problems can occur anytime with any package or delivery. Therefore, if any problem relating to such issues arises, then the Retail Order Fulfilment Assistant should have a viable problem for the same.

   For example, a Retail Order Fulfilment Assistant has a package order of detergent of a particular brand named X, that has to be delivered within two days. When the delivery person reaches the warehouse, then he finds that the concerning detergent is not in the warehouse. In such a situation, the Retail Order Fulfilment Assistant chooses to procure that detergent from another distributor at a slight higher price in order to avoid the late deliveries of products.

5. **Offering real-time tracking –** An appropriate staff should be allotted to the retail store that can have the capability of resolving the issues relating to products' deliveries if occur. This would increase the satisfaction levels of customers.

   For example, a customer raises a query that the delivered item is not in proper working order. Therefore, the customer service providers provide the immediate resolution of the issue by replacing the product with the product of the correct working order. Hence, real-time tracking helps the customers to get their issues resolved in a shorter span of time.

3.4.4 Customer's Refusal for Collecting Packaged Orders

A customer's refusal is termed as a situation when the customer denies collecting the packaged order of products. In few situations, when the delivery person reaches the customer's place for delivering products, then the customers refuses to accept the ordered products. Such situations are so unpleasant to the sellers because they would have invested their time, efforts, monetary funds, etc in these things. The cancellations done by the customers do not cost the customers. Instead, the sellers bear the losses due to such cancellations.

Reasons for customers' refusal for accepting packaged orders

If the customers have canceled the order or refused for accepting the packaged order, then it does not mean that the customers have definitely done wrong. Instead, the customers could have valid reasons too. The following points are the reasons why the customers would have refused for collecting the packaged orders:

- The customer would have not ordered anything so he would not have expected any type of package coming on his/her way.
- The customer would not be supposed to receive the packaged order. Or,
- The customer would have mentioned that he/she would not receive the packaged order at home. Instead, he/she would have mentioned another address at which the packaged or-der has to be delivered.
- The customer would not have needed the package anymore as the delivery person would have gotten too late.
- The customer would have received the damaged product so he/she would have returned the package at that time only.

Applied conditions for refusing the packaged orders

The customers' reasons are also valid but sometimes, the customers cancel the order as long as the delivery person just reaches the customer's place. Sometimes, they offer invalid reasons that are not considered solid reasons. Due to this situation, the customers cannot be given the freedom of refusing the product's deliveries. Hence, there are different provisions for refusing deliveries in online stores as well as courier companies.

The following table shows the scenarios where the customers can refuse for collecting the packaged orders from both stores:

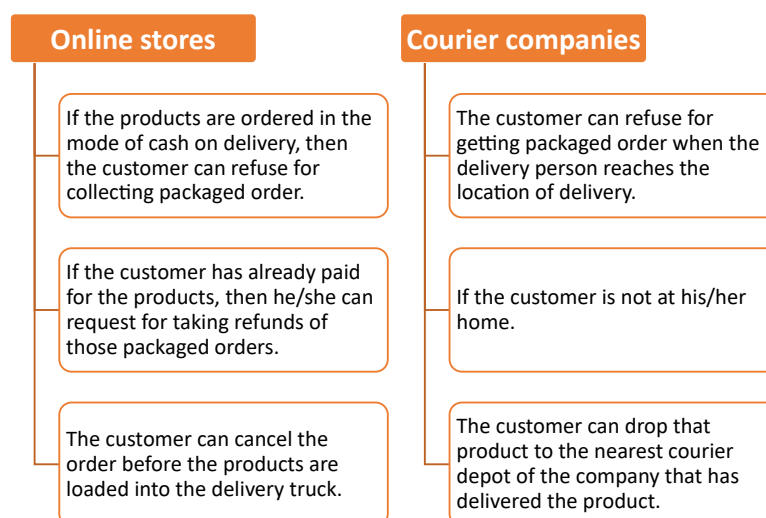| Online stores	Courier companies
If the products are ordered in the mode of cash on delivery, then the customer can refuse for collecting packaged order.	The customer can refuse for getting packaged order when the delivery person reaches the location of delivery.
If the customer has already paid for the products, then he/she can request for taking refunds of those packaged orders.	If the customer is not at his/her home.
The customer can cancel the order before the products are loaded into the delivery truck.	The customer can drop that product to the nearest courier depot of the company that has delivered the product.

Fig. 3.4.9: Scenarios for refusing package orders

Reimbursement policies relating to the receiver's refusal for accepting packaged orders

The reimbursement is termed as the process of giving money back to the person who has paid once for purchasing any product. Due to the reimbursement process, the customers remain assured that their money is saved. This enables them to make an order of the product. The reimbursement process happens with certain steps and takes a certain time period.

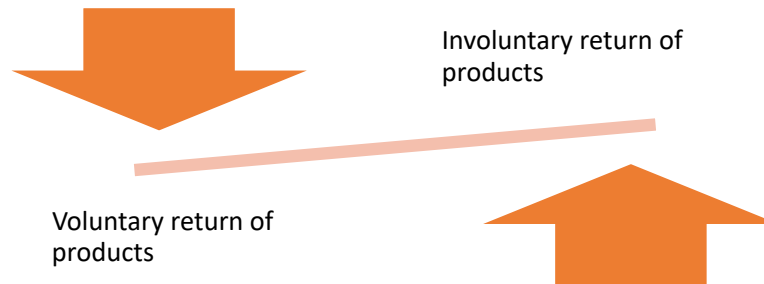There are two types of cases where the retail store also provides reimbursements. The two cases are defined below:

Fig. 3.4.10: Types of cases in which retail store provides reimbursement

Involuntary return of products

Involuntary return of products is defined as the scenario when customers request reimbursement involuntarily. In such situations, the customers are compelled to ask for reimbursement, instead, they would not want to. These situations can be anything like receiving a damaged product, receiving a package where the items are missing, etc. The customers do not want such situations. But if they come across any of these situations, then they generally file a complaint to the retail store and then request the reimbursement of their money or the delivery of the correct order. This request is made with the help of appropriate evidence and then the Retail Order Fulfilment Assistant analyses the entire case and gives refunds to the customers.

Let's take an example for the quite a better understanding.

A customer named A orders the color boxes of 25 shades. But when he receives the color box, then he finds that a total of 10 shades are missing in that color box. The customer files a complaint to the retail store. The Retail Order Fulfilment Assistant asks for a photograph of that color box. The customer sends the photograph to the Retail Order Fulfilment Assistant and after understanding the clear case of missing items in a package, the Retail Order Fulfilment Assistant checks whether the correct order color box is available in the workhouse or not. He does not find any color box in the correct working order condition, then he apologizes to the customer and processes the reimbursement request. The refunds generally happen within 4-5 working days of the retail store. After 4-5 days, the customer receives the refunds and his/her money returns back to him/her.

Voluntary return of products

Sometimes, the customers change their minds when the packages of orders are delivered to them. In such cases, they generally refuse for receiving the packaged order once the delivery person reaches their location. Here are two types of cases which are provided below:

Payment made through cash on delivery	Pre-paid payment
The customer would have to make payments on receiving the order,if he/she refuses for collecting the order, then there is no payment made to the retail store. Hence, there is no existence of the case of reimbursement process.	If the customer does not want to receive the orders, then he/she can cancel his/her order after giving an appropriate reason, then he/she is likely to get refunded within 4-5 working days.

Fig. 3.4.11: Types of cases in voluntary return of products

When the goods remain undelivered, then these packaged orders are delivered back to the retail stores.

The Retail Order Fulfilment Assistant is advised to update all reports of the delivered and undelivered orders separately in order to make the justifiable and understandable data. This data further helps the staff of retail stores to get the actual update of the packaged orders.

Activity

Conduct a debate among the students about the topic of "Customer refusal for collecting products' deliveries".

UNIT 3.5: Customer Satisfaction and Customer Experience during the Delivery Process

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Explain the concept of customer satisfaction
2. List the ways to satisfy the customers
3. Explain the concept of unloading process
4. Discuss the appropriate ways of unloading products from the delivery truck
5. Explain how to protect the products from the potential damages while unloading products

3.5.1 Basic Insights into Customer Satisfaction

In the previous units, we have studied how the Retail Order Fulfilment Assistant manages each and every step in an effective and efficient manner. The delivery of goods seems to be the last stage of customer handling, but it is not the actual last stage of product delivery. Instead, the customers are also provided the after-sales services in which their queries are generally resolved on a timely basis. Customer satisfaction gets changed with the way in which the products are delivered to him/her. Before moving forward to the concept of actual delivery of products, it is required to understand the basic meaning of customer satisfaction.

Customer satisfaction is termed as the scenario when the customers remain happy with the products or services they receive from the retail store. Customer satisfaction is measured by the extent of happiness that the customer receives from consuming the product or service. Customer satisfaction rises when the customers are very well served the products and services of good working order condition. Also, when the customers' queries are tackled in an efficient manner, then the customers remain satisfied to a higher extent. The Retail Order Fulfilment Assistant needs to take up a lot of effort into satisfying the customers at their best.

Customer satisfaction is the reason for making consistent improvements in the qualitative factors of the products and services. The customers are asked to present their satisfaction level by filling out customer survey forms, focus groups, etc. At the present time period, the customers are generally asked the star ratings at which they can present their satisfaction levels with the help of stars they give to the products and the service offerings of the retail store.

3.5.2 Importance of Customer Satisfaction

The customer satisfaction is pretty important and the following points reveal why the customer satisfaction is the most important for the Retail Order Fulfilment Assistant as well as retail stores:
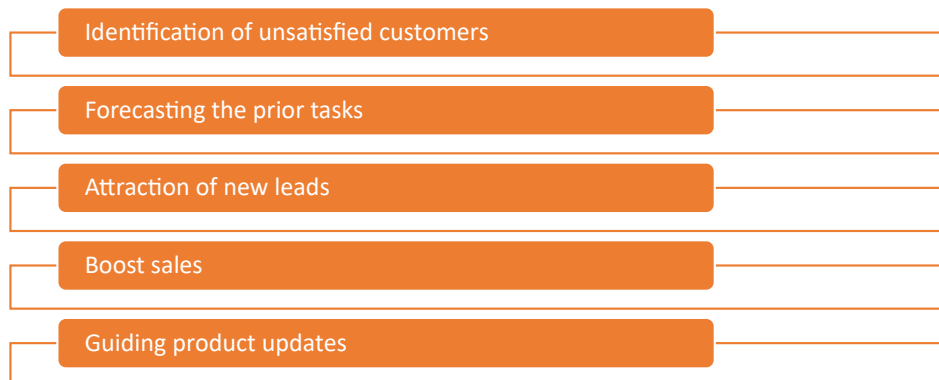
Identification of unsatisfied customers

Forecasting the prior tasks

Attraction of new leads

Boost sales

Guiding product updates

Fig. 3.5.1: Importance of customer satisfaction

Let's discuss each importance in detail.

1. **Identification of unsatisfied customers –** The Retail Order Fulfilment Assistant serves all customers with appropriate zeal and effectiveness. He/she handles each customer effectively but it is not always necessary that each customer gets satisfied in an equivalent manner. A few customers can have a negative experience with the products and services offered by a retail store. In such a situation, when customer satisfaction is measured, then the Retail Order Fulfilment Assistant gets the ideas of those customers who remain unsatisfied. Therefore, the numbers of unsatisfied customers are very well known with the help of an analysis of customer satisfaction.

2. **Forecasting the prior tasks –** In the previous unit, we studied how several steps are followed in delivering the products to the customers. In the entire list of steps, the customer can get dissatisfied at any stage of the product's delivery. Therefore, the Retail Order Fulfilment Assistant can get knowledge of areas that require regular improvement. With the help of appropriate feedback, the Retail Order Fulfilment Assistant can prior the areas which need improvements from the point of view of customers.

3. **The attraction of new leads –** In the retail business, new leads mean the new customers which are being added to the customer base of a retail store. If the negative customer satisfaction can reduce the existing number of customers. Then, the positive customer feedback can add to the total number of customers for a retail store. On demanding customer satisfaction levels, when the customers provide positive satisfaction with the products and services they consume, then these satisfaction levels attract new potential customers.

4. **Boost sales –** When the customers provide positive reviews on getting good satisfaction, then their reviews catch a few more new customers. With the help of new customers, the sales volume of the retail store rises to a larger extent.

5. **Guiding product updates –** In the direction of measuring customer satisfaction, the Retail Order Fulfilment Assistant gets the reviews of the products and services offered to the customers. This helps the Retail Order Fulfilment Assistant to update the product in the required manner so that the overall profit volumes of the retail store can increase.

3.5.3 Ways of Satisfying the Customers

Customer satisfaction has become an important key in today's dynamic world where people want the best products and services at the agreed prices. There is a one-liner quote that helps in understanding the customer behavior efficiently.

"Right package to the right location to the right person at the right time"

This one-liner says everything about the ways by which the customers can achieve maximum amounts of satisfaction.

- The customers require the right package in which the right materials are placed in the right working order.
- The customers want the packages delivered at the right location with safe unloading.
- The customer wants that the only legally assigned person should be delivered a package. No random person can be given the package.
- The customer wants to get the delivery of the package at the right time.

3.5.4 Unloading Process

When the delivery person brings the products, then those products would not reach inside the customer's house by automatic flight or something. The products or the packaged orders are handled by the manpower. The delivery person loads the products from the retail store to the customer's location with the help of a delivery truck and then the products are unloaded from the delivery truck to inside the customers' houses.

The unloading process is the fundamental step when the delivery person reaches the customers' location. It is important to move the products from the delivery truck to the customer in-house. The list of all related activities is termed the unloading process.

3.5.5 Guidelines for Unloading Process

The biggest and harshest job for the Retail Order Fulfilment Assistant is to unload the products from the delivery truck once it reaches the customer's location. This is because the Retail Order Fulfilment Assistant can ensure the smoother pathways of the location where the warehouse exists, but the customer's location can have complex pathways like there can be several pits, broken pathways, etc. In such situations, it becomes difficult for the delivery person to deliver the products safely to the customers with the safe loading. Despite such difficulties, there are several guidelines that are generally followed in the unloading process of products;

- The delivery person should take the smoother way of reaching the customer's location where traffic congestions are quite less.
- The packages should be packed in two or three layers so that it could prevent the chance of product damage.
- The vehicles should be driven with the usage of a stable brake system.
- There should be one person assigned for putting out the packaged orders from the delivery truck.
- The packaged orders should be kept in a proper sequence so that no single place of the delivery truck gets overloaded.
- The driver of the delivery truck should also assist the person who is unloading the packaged order.
- The packaged order should be placed in a hierarchy of their deliveries as per the delivery schedule.
- The packaged order should be delivered to the immediate doorstep of the customer.

3.5.6 Relationship Between Customer Satisfaction and Unloading of Packages

The customer comes to the doorstep when he/she gets notified that the delivery person is at his/ her location. The customer sees and observes how the delivery person unloads the package and this unloading way makes the expression of the retail store in the customer's eye. It tells the customer how the retail store responsibly handles all packaged orders. The customer observes this behaviour prior to opening the actual package. Therefore, the unloading of packages puts a good impression on customers and their satisfaction levels.

For example, a delivery person reaches the customer's location and mistakenly mishandles the packaged order. The customer gets angry at seeing the scenario of mishandling packages. After receiving the packaged order, the customer puts that packaged order at their home and while doing that he himself is not careful and mis-handles the product in the process. Once the packaged order is opened, the customer finds a damaged product inside. He/she starts blaming the delivery person for this cause whereas the actual damage happened at the time when the customer mishandled the product.

But, in this situation, the customer is not likely to understand his/her mistake. Even, the customer starts blaming the retail store and the retail store has to replace the products without asking any questions from the customer.

We have better understood the importance of unloading products safely and securely. Therefore, in unloading products, they can break, spoil due to unsuited temperatures, etc. In this situation, the delivery person needs to take extra care of the packages right away from the warehouse.

3.5.7 Ways of Preventing the Damage to Packages due to Unloading Packages

There are a lot of ways that help the Retail Order Fulfilment Assistant and delivery person in ensuring the prevention of damages that cause to the products at the time of unloading the package of products.

Adoption of adequate packaging practices

Usage of correct pallet sizes for packing the products

Appropriate labelling of the packages

Usage of rain and sweat-sensitive containers

Trained drivers and trained personnels for assiting drivers

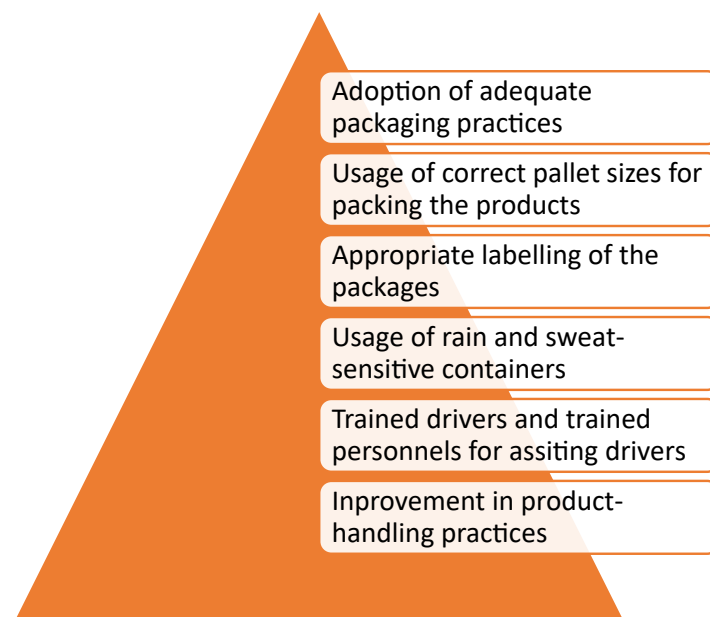Inprovement in product-handling practices

Fig. 3.5.2: Ways of preventing damage to the package

Let's discuss each way in detail.

1. **Adoption of adequate packaging practices** – The product can get damaged anytime while unloading it. The product gets damaged only when adequate protection is not pro-vided to the product. The adequate protection for any product is effective packaging. The packaging of products does not only provide a safeguard to the products in the unloading process, instead, but the packaging also keeps protecting the products in transit too. Ef-fective packaging is a tough exercise as the Retail Order Fulfilment Assistant needs to allot the packaging slacks and carton boxes of appropriate sizes and shapes which can make sure of appropriate protection of products.

2. **Usage of correct pallet sizes for packing the products** – The delivery person arranges products in the pallets while driving the delivery truck to the customer's location. The products can fall from the pallets in transit due to inappropriate pallets. Therefore, the pallet size is a matter of concern for packing the products. The pallet size should be a bit bigger than the package of products.

3. **Appropriate labeling of the packages** – The delivery person brings several packages al-together in one round. He/she needs to arrange the packages with respect to the sizes, weights, number of products lying in a package, etc. By labeling all products, the delivery person can better arrange all products in an appropriate sequence. Also, the delivery person can put the products near the gate of the delivery truck which is to be delivered earlier. This prevents the packages from being broken.

4. **Usage of rain and sweat-sensitive containers** – The products can get damaged when they are hit by unpleasant temperatures and weather conditions. Therefore, the contain-ers in which the products are placed are in the desirable conditions. For example, if the package contains perishable items, then those items should be placed in refrigerated conditions. Therefore, appropriate ventilation should be provided to all containers and all products should be kept in dry places.

5. **Trained drivers and trained personnel for assisting drivers** – The drivers should not be sent alone for delivering products. This is because if the drivers are sent alone, then their major concentration lies in driving the delivery vehicle only. If the assistant of the driver would go along with the driver, then the driver would get appropriate help and the pack-ages would be delivered to the customers safely and securely.

6. **Improvement in product-handling practices** – Despite taking all safety and precaution-ary measures, if the delivery person and Retail Order Fulfilment Assistant do not know the appropriate way of handling products and the deliveries, then nothing can happen. There-fore, the major concentration should be put on the practices of handling products. The better practices would also facilitate a reduction in the potential damages that could be happened to the products.

The customers get attracted to the retail store by looking at the operations, ways of delivery, least time taken in delivering products, etc are the factors that generally enable the customers to place orders again and again. This is because when the customers get the early and safe deliveries, then they potentially become happy with the services offered by the retailers and they place the repetitive orders.

Activity

There is one-liner that is given below,

"Right package to the right location to the right person at the right time"

Write one paper and express this line in your viewpoint.

UNIT 3.6: Building Rapport with Internal and External Customers

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Explain the differences between internal and external customers
2. Explain the concept of rapport
3. Explain why it is essential to build rapport with the internal and external customers
4. Recognize the best ways to establish a rapport with every consumer so that you are able to treat them appropriately

3.6.1 Difference Between Internal and External Customers

In all previous units, we studied how the Retail Order Fulfilment Assistant ensures the smoother delivery of products, but in the entire process, the most significant thing is to build rapport with all customers whether they are internal customers or external customers. Before studying the ways of building rapport, it is important to know the appropriate difference between internal and external customers. After having a basic knowledge of the distinctions between external and internal customers, we will study the ways of building rapport with these entities.

The internal customers are termed as the people who have an employability relationship with the retail store. The internal customers are part of the retail store in terms of workers who work in the store. Whereas, the external customers are the people who do not work in the retail stores and are the purchasers of products from the retail store externally.

There is a fine line between internal and external customers. The internal customers are the workers of the company who purchase the products and services from the retail store. Whereas the external customers are the customers who are made from outside the retail store. Both of these customers are equally important to the retail store. The retail store makes profit margins from both customers. This is why handling them is quite tricky for the Retail Order Fulfilment Assistant too.

3.6.2 Basic Insights of Rapport

The rapport is termed as the development of friendship, mutual trust, understanding, etc to flourish the good communication among the people whether they work inside the retail store or the external customers who purchase products. The rapport ensures the establishment of good interpersonal relationships among the people. The rapport can be good as well as bad. A good rapport ensures that the people can share anything they feel. Whereas bad rapport means that the people just pretend to have good interpersonal relationships, but in reality, the people do not share good relationships with each other.

Rapport is important because:

• Rapport builds trust among the people. Good communication levels bind the people and inject the feeling of trust among them. When people share good communication, then they start sharing all problems, failures, and good feedback. As a result, people start sharing everything with each other.

When the Retail Order Fulfilment Assistant builds a good rapport, then trust is formed between customers and the Retail Order Fulfilment Assistant. This trust facilitates the customers to make more purchases from the retail store.

- Rapport establishes the respect of people from both sides. When the rapport gets established, then the people start understanding each other. Therefore, this understanding brings respect to the people. The good rapport between customers and Retail Order Fulfilment Assistant increases their understanding levels of customers and in case of any query, the customers give good time to the Retail Order Fulfilment Assistant for resolving those queries.

- Rapport implies effective communication among people. Effective communication serves better feedback on the table. Better feedbacks give the chance to the retail store for bringing improvement in the products and services. In the context of customers and Retail Order Fulfilment Assistants, effective communication enables the customers to give appropriate feedback. The feedback then helps the Retail Order Fulfilment Assistant to bring improvements in the products and services.

- Due to good rapport among Retail Order Fulfilment Assistants and customers, the customers know that their issues get resolved at the earliest. Also, they know that their feedback is taken and incorporated, then which makes the customers make repeat purchases. The repeated orders do not only retain the existing customers, instead, these orders also bring new customers to the retail store.

3.6.3 Importance of Building Rapport with Internal and External Customers

Since we know that the internal customers are dependent on the retail store for their livelihood. This is because the internal customers are actual workers who indulge in the retail store and facilitate the Retail Order Fulfilment Assistant to operate the retail store. Therefore, they get the wages and salaries from the retail store itself. In this direction, if the Retail Order Fulfilment Assistant would not give enough importance to the internal customers, then there should be no issues. The Retail Order Fulfilment Assistant should make all efforts in building rapport with external customers only. But the reality is so beyond this scenario. In reality, the internal customers are equally important as the external customers. This is because the internal customers also work within the retail store. If they observe any type of query or something, then they can openly communicate with the Retail Order Fulfilment Assistant. And then the Retail Order Fulfilment Assistant can make improvements to the products and services. Since the internal customers belong to the retail store itself, this feedback will remain inside the retail store only. This would prevent the retail store from the sales dropdowns because the competitors take due advantage of the complaints made by the external customers.

- This is pretty obvious that the external customers have been always important to the Retail Order Fulfilment Assistant as they are actual business developers for the retail store. The external customers bring the actual profits to the retail store. But the internal customers are often ignored. Therefore, it is important for the Retail Order Fulfilment Assistant to understand the importance of internal customers.

- The internal customers live inside the retail store and are primarily dependent on the store only. The rapport with these customers facilitates the internal customers to work better.

- The internal customers provide feedback on products and services and they also provide solutions to fix those feedbacks.

- The internal customers have always been the primitive customers of the retail store. This is because when the retail store introduces the products, then the Retail Order Fulfilment Assistant first sells the products to the customers only. So, the Retail Order Fulfilment Assistant would encounter the addition of external customers along with the retained internal customers.

- If the internal customers are treated well and they enjoy the consumption of those products, then the customers generally remain so overwhelmed with the products. This facilitates them in retaining the retail store.

- The Retail Order Fulfilment Assistant puts a lot of effort into work and producing products and services when they know that they would also consume these products.

- Good treatment with the internal customers makes them more satisfied and then these customers also promote these products and services to others. Hence, it can be said that the internal customers also help in bringing the external customers with the least cost.

3.6.4 Ways of Building Rapport with Internal and External Customers

We have known that both internal and external customers are important to the retail store. Therefore, they must be treated equally. There are the following ways that help the Retail Order Fulfilment Assistant to build rapport with the internal as well as external customers.

Always get the names of customers

Speak to the customers with a smile

Try to understand the customers' priorities

Allow the customers to get out of their anger

Empathize with the customers' problems

Serve apologies when fault is at the retail store's end

Fig. 3.6.1: ways of Building Rapport with internal and external customers

1. **Always get the names of customers –** The customers are overwhelmed when they know the workers in the retail store know them by their names. They feel respected. Even the workers or employees who work in the retail store also get happy as their names are remembered by the Retail Order Fulfilment Assistant despite many people working in the retail store. This is the very first step where the Retail Order Fulfilment Assistant takes up the hearts of both customers.

2. **Speak to the customers with a sweet smile –** This is true that communication is the major key that can bring success or failure to the person. In a retail store, the Retail Order Fulfilment Assistant becomes capable in retain the customers only when they share a cordial relationship with the customers whether the customers are internal or external. If the customers are communicated with a sweet smile, then they get impressed by the Retail Order Fulfilment Assistant as all retail stores can offer the same types of products, but all retail stores can't treat all customers properly.

3. **Try to understand the customers' priorities –** Nowadays, the customers know that the Retail Order Fulfilment Assistant's task is to retain them for raising the profit margins of the retail store. But the stores from which the executives perform a bit social responsibilities, the customers become more attracted towards those stores only. The customers' fundamental priorities are getting the products and services worth of good quality factors, resolution of the complaints of the customers, etc. Customers' satisfaction rises when they get what they want. Therefore, in order to satisfy the customers, the Retail Order Fulfilment Assistant needs to understand the priorities of customers first so that they can get a solid way of retaining the customers.

4. **Allow the customers to get out of their anger –** The customers file the complaints to the Retail Order Fulfilment Assistant in regards to the faulty types of products and services, then it is important for the Retail Order Fulfilment Assistant to undertake all anger of the customer at one point in time. This makes the customers get calm down and comfortable.

5. **Empathize with the customers' problems –** The customers appreciate the treatments and service offerings of the Retail Order Fulfilment Assistant and become capable to serve good feedback appropriately. Therefore, the Retail Order Fulfilment Assistant should show how he/she understands the customers' feelings in understanding their plights.

6. **Serve apologies when fault is at the retail store's end –** When the Retail Order Fulfilment Assistant gets to know that in a particular situation, fault happened at the store' end, then he/she should not argue with the customers to represent the good reputation of the firm. Instead, he/she should apologize to the customer by accepting the fault at the retail store's end.

The Retail Order Fulfilment Assistant should try hard to serve the good treatment to the customer at the time of delivering products and providing after-sales activities.

Activity

Role play:

A customer is annoyed with the products in which the retail store is dealing currently. The customer is filing complaints against the product. The customer works within the retail store. Draft the conversation that would happen between the customer and Retail Order Fulfilment Assistant regarding the failure of product delivery.

Summary

- Equipment required for delivering products
- Paperwork required for delivery of products
- Ways of getting delivery address
- Role of a delivery boy
- Scheduling deliveries
- Fuel economy for delivering products
- Safe transportation and delivery of goods
- Advantages of delivery management
- Different types of retail deliveries
- Delivery of products at the agreed times
- Identifying the correct delivery recipient
- Importance of on-time delivery of products
- Reasons for customers' refusal for accepting packaged orders
- Ways to satisfy the customers
- Appropriate ways of unloading products from the delivery truck
- Building rapport with internal and external customers

Exercise

1. List the equipment that is mandatory for the Retail Order Fulfilment Assistant to deliver products.
2. A package contains butter, cream, and cheese. Which logo will be placed on the packaging of these products?
3. A Retail Order Fulfilment Assistant belongs from India and he/she has to export products to Canada. What paperwork is required for delivering products to this location?
4. List the details that the Retail Order Fulfilment Assistant needs to provide to the delivery person for making appropriate deliveries of products.
5. Establish the sequence that the delivery person should know to get the shipment address for delivering products.
6. Explain the meaning of the delivery schedule.
7. List the details essential for drafting the delivery schedule
8. A retail store named ABC Pvt limited does not provide the delivery vehicle to the delivery person. What will be the scenario when the fuel in the delivery truck gets ended in transit?
9. How can the Retail Order Fulfilment Assistant ensure the delivery of products at the agreed times with the customers?
10. Who is a delivery recipient?
11. Why is it essential to deliver products to the right customer only?
12. List the company procedures that ensure the right delivery of products to the right person.
13. State the chronology in which the customers' orders are fulfilled by the Retail Order Fulfilment Assistant.
14. A Retail Order Fulfilment Assistant spends Rs. 5000 in adding 125 customers. Calculate the customer acquisition cost in this case.

15. In which conditions, the customer can refuse for collecting the packaged orders?

16. A customer makes the payment through his/her debit card and he/she denies for collecting the packaged order. State the expected reimbursement process that would be carried out in this case.

17. Why is it necessary for the Retail Order Fulfilment Assistant to satisfy the customers?

18. What are the basic expectations of customers in collecting products?

19. A customer orders the perfume bottle and the bottle cracks in mid. This is due to the usage of inappropriate box for packing the perfume. What is the potential reason of this damage?

20. State the distinction between internal and external customers.

21. Why is it required to build rapport with all types of customers?

22. List the appropriate ways that help in building the rapport with all customers.

Notes

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4. Processing Cash, Returns and Customer's Orders

Unit 4.1 - Processing Cash and Credit Transactions

Unit 4.2 - Processing Returned Goods

Unit 4.3 - Processing Customer Orders in a Retail Environment (Multi-channel/Omnichannel)

RAS/N0112, RAS/N0116 & RAS/N0117

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Carryout cash and credit transaction
2. Recognize modes of payment
3. Explain about credit transactions
4. Identify the management of credit transaction
5. Role of Retail Order Fulfilment Assistant in procession in cash and credit transaction

UNIT 4.1: Processing Cash and Credit Transactions

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. List the types of payment
2. Identify the mode of payments
3. Describe the steps in processing of cash and credit transaction
4. Explain the CODs and pre-paid processing in e-commerce
5. Explain the ways how to manage customer credit accounts
6. Identify the features and functions of credit sales
7. List the conditions that are used for credit sales
8. Elaborate end of the day reconciliation report
9. Explain the importance of the cash handling process
10. List the skills, roles, and responsibilities of the Retail Order Fulfilment Assistant

4.1.1 Introduction to Processing Transaction

In the retail sector, a Retail Order Fulfilment Assistant provides cash and credit facilities to the customer. Customers avail of the facility to make payment in cash or cash equivalent tenders, immediately or on a subsequent date. The Retail Order Fulfilment Assistant uses a set of processes and instruments to process the cash and credit transactions. When the customer pays in full the sale is complete and when the customer chooses to pay at a subsequent date, the transaction becomes a credit sale where until the full payment is made, the sale is not complete.

4.1.2 Payment Transaction

In the retail sector, payment is a business transaction of exchanging financial instruments (rupee, cheques, UPI payments, etc.) which occurs as a result of buying and selling goods and services. In the retail sector customers purchase the product and pay the amount in cash or cash equivalent to the Retail Order Fulfilment Assistants. In order to make the payment of purchased goods or services, the Retail Order Fulfilment Assistant provides two modes of payment to his customers. These modes of payment are-

• Direct Transaction
• Credit Transaction

```
                          ┌─────────────────┐
                          │ Type of payments │
                          └─────────────────┘
                   ┌──────────────┴──────────────┐
            ┌──────────┐                    ┌──────────┐
            │  Direct  │                    │  Credit  │
            └──────────┘                    └──────────┘
          ┌──────┴──────┐                 ┌──────┴──────┐
    ┌──────────┐  ┌──────────────┐   ┌──────────┐  ┌──────────────┐
    │   Cash   │  │ Card, UPI etc.│   │   Cash   │  │ Card, UPI etc.│
    └──────────┘  └──────────────┘   └──────────┘  └──────────────┘
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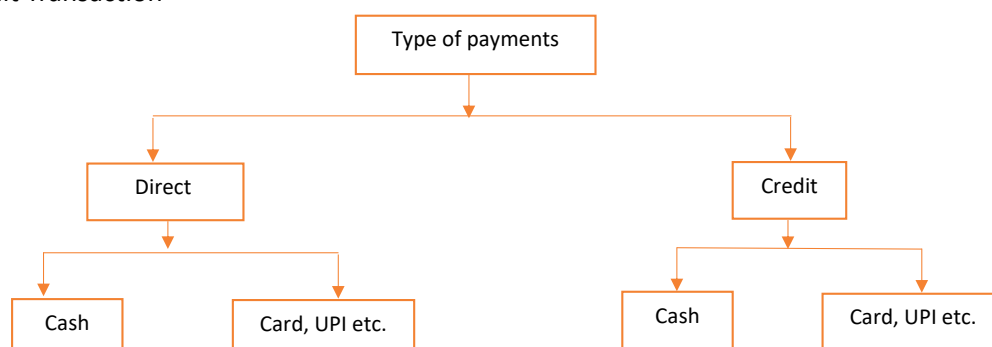
Fig. 4.1.1: Modes of payment

Direct payment transactions are the immediate settlement of payment. The customer uses this mode to make payments in cash or cash equivalent.

Credit payments are a business transaction whose impact does not involve the exchange of cash at the time of occurrence of the transaction. Such payment transactions execute at a subsequent date

For example, a manufacturer sells his goods to a wholesaler who does not pay immediately for the goods he bought. The manufacturer offered him a credit period of 30 days to make payment. This is a credit sale of goods that does not involve immediate cash exchange.

Process of cash and credit transaction: In the retail sector, an individual Retail Order Fulfilment Assistant or business entity sells good and services to customers and receive the consideration in cash or cash equivalent. To receive the amount of a product, a Retail Order Fulfilment Assistant at cashpoint allows the customer to pay the amount in cash or digital form. There are the following two types of cash payment customers use to pay for the products: -
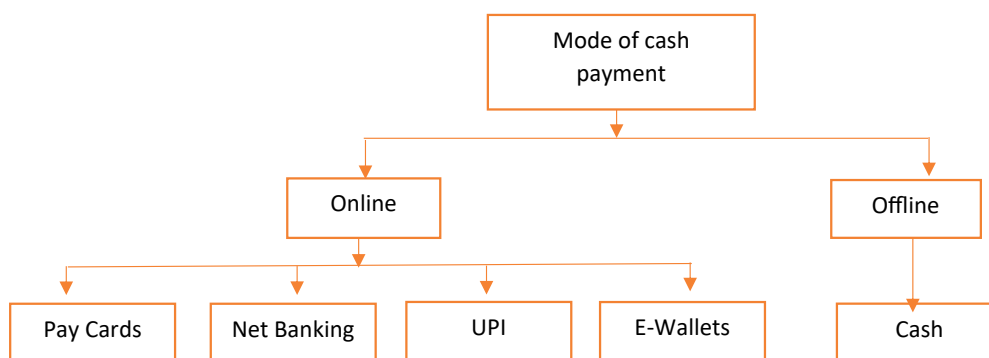

Fig. 4.1.2: Modes of cash payment

- Offline cash payment: Offline cash payment is a traditional form of cash payment. In order to make offline payments, customers use notes, coins, and cheques to pay the amount immediately or on a subsequent date.
- Online Cash Payment: Online cash payment is a mode that allows customers to make payments online. In order to make online payments customer uses the following instruments to pay the bill amount immediately or on a subsequent date: -
  - Pay cards: These are the plastic cards linked with the bank account of an individual. For example- debit cards and credit cards. To make a payment through a payment card customer needs to swap the card on EFTPOS.
  - Net Banking: It is an online form of banking where the user can access his bank account through the website and mobile application of the bank.
  - UPI: Unified Payment Interface is an advanced form of online payment through which a customer can make payment for a product through the smartphone.
  - E-Wallet: E-Wallet or Digital wallet is an online service or software program which allows a payee to make payment using a third-party platform such as Paytm wallet, google pay, etc.
  - Gift Cards/ Gift Vouchers: A gift card is a prepaid card, issued by a store/business that contains a specific amount of money available for use for a variety of purchases. Store gift cards are designed to be used by specific merchants or Retail Order Fulfilment Assistants. The gift vouchers or gift cards can be used once or multiple times depending on the issuing store/ business and their policies.

4.1.3 Cash Transaction Process

The Retail Order Fulfilment Assistant at the cashpoint scans the barcodes of a product and verifies it description by using POS equipment (computer, screen).

Process

- The scanner scans the barcode and transmits the product description to a POS connected computer
- The Retail Order Fulfilment Assistant verifies the products description displayed on the computer screen
- Calculate the amount of a customer's total purchased item using the inbuilt calculator of the cash register
- Collect the amount from the customer. If the amount is in the form of

Cash: Count the received cash (rupee, coins) and put it into the POS cash drawer.

Pay cards: A customer can pay the amount using a debit or credit card. In such a situation Retail Order Fulfilment Assistant offers EFTPOS (electronic fund transfer point-of-sale equipment) device to swap the card. Subsequently, the Retail Order Fulfilment Assistant enters the bill amount in EFTPOS and receives the bill amount direct from the customer's bank account.

UPI: Unified Payment Interface is a mode of payment where a customer needs the store UPI to pay the bill amount.

Note:-In order to generate a UPI signatory a person needs a mobile number linked with his bank account.

E-wallet- Every store has its unique QR code, and when a customer wants to pay the bill from his E-wallet, he needs to scan the QR code. After scanning the QR code he can pay the bill amount from his e-wallet (Paytm, google pay)
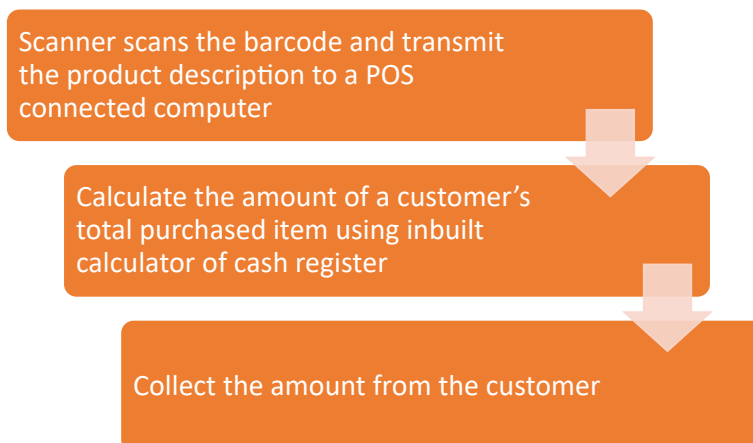
Scanner scans the barcode and transmit the product description to a POS connected computer

Calculate the amount of a customer's total purchased item using inbuilt calculator of cash register

Collect the amount from the customer

Fig. 4.1.3: Cash transaction process

4.1.4 CODs or Prepaid Processing in E-commerce

E-commerce means the platform where people place their orders on websites and then the retail stores deliver products to the customers. The customers are given the option of making payments either in advance or at the time of delivery.

There are different contexts for both scenarios. One scenario is the COD while another is the prepaid processing. Let's discuss each scenario in detail.

Payment through cash on delivery:

When the customer prefers to make the payment through cash, then the customer needs to just place the order on the website. After placing an order on the website, the customers are supposed to make payments in cash once the Retail Order Fulfilment Assistant comes to deliver the packaged order to the shipping address. In such a scenario, the orders are processed once the customer places the order while the payment mechanism gets finished once the Retail Order Fulfilment Assistant receives the payment in cash.

At the time of COD, the Retail Order Fulfilment Assistant can present the scanner where the customer can make payments through UPI or the customer can pay directly in cash.

Pre-paid processing:

Sometimes, the customer makes payment in advance when they order something online. This processing just happens at the time once the order is placed. In this scenario, the customer places an order on the website and makes payment online in an advance, then the Retail Order Fulfilment Assistant processes the order. When the products get delivered, then the customer just has to receive the order and give a confirmation that he/she has received the package.

The Retail Order Fulfilment Assistant has to segregate the payment information along with the packaged orders in order to avoid further confusion.

4.1.5 Credit or Custom Payment Transaction Process

In the retail sector, credit transaction is also known as the custom payment method, which offers flexibility in bill payment. There are two methods of credit

transaction: -

• Split credit transaction
• Layaway

Split payments: In the retail sector, individual Retail Order Fulfilment Assistants or business entities provide a facility to split the bill amount into two or more parts of small amounts. Such a credit transaction system does not need to pay the whole amount at one time and gets the opportunity to pay the bill amount in parts and on subsequent dates.

Layaway: It is a method to hold or book merchandise to the Retail Order Fulfilment Assistant by depositing some money. The customer can make the payment in instalments rather than paying it once. However, the customer can get the product after making the full payment.

Process: There are two ways for credit transactions: -

Cash: The customer needs to pay in cash (rupee, coins) in instalments. customer visits the store at regular intervals to pay the instalment in cash.

Banking: In this method, the customer assigns the duty to his bank account to pay instalments. At regular intervals (monthly) instalments get auto-debited from the customer's bank account

Point-of-Sale (POS) system makes it effortless for the customer as well as for the Retail Order Fulfilment Assistant to efficiently process the cash and credit transactions.

Conclusion:

The focal point of every Retail Order Fulfilment Assistant is the seamless journey of customers, in which the processing of payment transactions plays a vital role. POS systems make it effective and effortless for both parties (customer, Retail Order Fulfilment Assistant) to process the payment transaction.

The role of the Retail Order Fulfilment Assistant is to help customers check out fast. This can be done by using the right skills to operate the cashiering system and the payment system. Sometimes delay can occur in packaging the items bought by customers. An additional help to bag items post purchase will increase the speed of customer check outs at the cash counters. The Retail Order Fulfilment Assistant can use the 'queue busting' technique when specific cash counters are crowded by redirecting customers to cash counters where there could be less customers in the queue. Another way of que busting is by using a PDA. A PDA is a personal digital assistant, also known as a handheld PC, is a mobile device which functions as a portable billing system.

Case Study

Creating a proper customer experience leads to better customer satisfaction, and a fast point of sale allows one to complete the transactions faster. Consumers don't like to wait and a fast point of sale is an excellent advantage for them too.

Activity

Field visit for observation of cash handling and related precautions in a retail store.

Procedure

1. Prepare a checklist of the points to be observed during the visit to the retail store
2. Reach the store as per schedule.
3. Greet and interact with the Retail Order Fulfilment Assistant and observe:
   • Procedure for receiving the amount in cash
   • Procedure taken while processing debit/credit cards to accept payment
   • Procedure of credit payment.
4. Note all observations, discuss with the friends finalize by confirming with the executive/Retail Order Fulfilment Assistant.
5. Prepare a report and submit

4.1.6 Managing Customer Credit Accounts

In the retail sector, Retail Order Fulfilment Assistants provide credit facilities to the customer. The credit facility facilities the customer to avail of the product and make its payment later on a subsequent date. This facility plays a vital role in maximizing sales. On the other hand, it increases the risk of late payment, which affects the business growth of an individual Retail Order Fulfilment Assistant or business entity. This Unit on 'Managing customer Credit accounts' covers various aspects like features and conditions for credit sales, identifying credit checks and getting authorization, describing the process of credit requisitions, and demonstrating the techniques for determining creditworthiness. This Unit deals with the features of credit sales, credit sales agreements, retail credit facility flexibility, and terms and conditions.

Features and Conditions for Credit Sales

Credit sales refer to sales that involve extending credit to the customer. The customer takes the product now and agrees to pay for it later. Credit sales are a type of trade credit. They create receivables or money owed to the company from customers. Credit sales terms often require payment within one month of the invoice date but may also be for longer periods. The due amount may be collected in different forms, such as lump-sum payment, hire purchase system, and instalment purchase system. Retail firms sell goods on credit due to the following benefits:

• **Meet the competition:** When competitors are making sales on credit to customers, any business will need to do the same just to stay competitive.

• **Increase in sales:** The credit facility gives an opportunity for customers to pay later and in the instalment of a small amount. As a result, a store offering the credit facility gets an increment in the sale.

• **Better customer loyalty:** Credit facility to customers indicates that the Retail Order Fulfilment Assistant respects and trusts their customers. Customers admire these gestures of confidence by continuing to buy from the store.

Characteristics of credit sales

A credit sale is selling goods to a customer by transferring from a Retail Order Fulfilment Assistant to the customer without paying the money immediately. Payment of goods can be done as per the agreement. The characteristics of credit sales are as follows.

• The transferor deals in goods and services.
• The title of the goods lies with the Retail Order Fulfilment Assistant before it is sold on credit.
• There are fewer formalities such as application form filling.
• It can be extended for three months.
• It depends on the terms imposed by the Retail Order Fulfilment Assistant.
• No security is required.
• It can be facilitated with different financial institutions with easy terms and conditions at a
• continuous rate.
• Almost half of the short financial requirement of retail is met by this type of mutual trust and cordial relations.

Credit sale agreement: A credit sale agreement is an agreement for the sale of goods under which the purchase price, or part of it is payable in instalments.

Identify customer need for credit facility:

In retail sales, business entities provide credit facilities to their customer. In order to provide credit facilities, they identify their customers' need for the credit facility. Usually, they talk with their customers to know about their need for credit facilities such as:-

• Shopping preference of the customer?
• Ask questions to understand the customer's budget for shopping
• Mode of payment the customer prefers

Thereafter Retail Order Fulfilment Assistant offers the credit facility to the one who requires and wants to avail of it.

Carry out necessary credit checks and get authorization of credit facility:

There are some eligibility criteria for a customer to pass through to avail of a credit facility. In this security check, customers apply for credit by filling out a form. The Retail Order Fulfilment Assistant uses this application form to know about the repayment history of the applicants.

Need for the credit check

• To analyse the customer's credibility on repayment: The applicant should not be bankrupt or a defaulter.

• Customer's background: The applicant should not be involved in any act of terrorism

The Retail Order Fulfilment Assistant examines the applicants' papers carefully. Subsequently Retail Order Fulfilment Assistant offers the credit to qualifying applicants only. Usually, companies hire a third party to perform credit checks.

In a retail store, the concerned team of credit facility explains their credit plan to the customers and provides them with the credit facility. Usually, the concerned team explains the complete criteria of the loyalty program:

• Required documents

• How much time will the company take to deliver the loyalty card to the customer?

• What details customer has to provide.

• Documents and forms are required to be filled by the customer before enrolling

Subsequently, the concerned team provides the application forms to the customer and explain the features and condition to use the credit facility. While approaching the customer for the credit facility, the concerned team takes care about

• Giving any false statement about benefits, validity, etc. of the facility.

• Creating a false impression, or leading the client to the wrong conclusion,

• Conclusions, assumptions, or statements may lead people to believe

• Interpretation of particular items or points

It is most important that information about the program must be accurate, and reliable

Repayment terms of credit facility: The repayment terms include the interest rates and date for repayment in case of a term loan, minimum payment amount and recurring payment dates, or a revolving loan. The agreement details whether interest rates may change and specifies the date on which the loan matures.

Conditions used for the sale of goods on credit

A contract of sale or an agreement of sale is a legal contract for the exchange of goods, services, or property between Retail Order Fulfilment Assistant and buyer for an agreed value in money. Features of the contract of sale are as follows:

• It can be made in writing or by word of mouth.

• A contract of sale is a generic term, which includes:

1. **Sale and Agreement to sell:** Agreement to sell constitutes the terms and conditions of sale by the Retail Order Fulfilment Assistant to the buyer. These terms and conditions include the amount at which it is to be sold and the future date of full payment.

2. **Goods:** The subject matter of the contract of sale of goods must be some goods. The purpose of this contract is to transfer the property in these goods from the Retail Order Fulfilment Assistant to the buyer.

3. **Price:** The consideration: In a contract of sale the consideration is 'price'. Price or consideration may be partly in money and partly in goods.

The credit requisition contains information on the desired products, details of possible vendors, delivery instructions, accounting details, contact information, etc. The sales associate must follow the criteria in processing credit sale applications.

Collaborative tie-ups with banks for credit management: Partnership between banks and fintech companies is already around a five-year-old phenomenon in the country. Banks had physical reach through their network, a large base of customers and their trust, and a brand built over the years. Fintech start-ups, on the other hand, brought technology to digitize banks' legacy systems at the backend and provide smarter and more flexible banking for customers at the front end. The arrangement has been a win-win so far that has further evolved now.

Store cards: A stored-value card, or gift card, is a type of electronic bank debit card. Stored value cards have a money value pre-loaded to them. Credit card networks, bank card issuers, and retail merchants provide these cards as a way to provide non-cash payment cards to the public for a variety of purposes. Store cards encourage shoppers to purchase items on credit today and pay them off over time. One can also earn rewards that can be used at that store. Customers receive discounts, special financing, and other exclusive promotions.

Difference between store cards and credit cards:

Store card	Credit card
Can be used only at a specific store	Can be used anywhere where the credit cards re accepted
Provides discounts and rewards at a particular store only	Provides discounts and rewards at many places.
It is easy to avail	It is difficult to avail relatively
It does not cater to the demands of higher value.	It has ability to redeem rewards for higher value, like premium flights or five-star hotels
It is only limited to the store benefits and no additional benefits outside the store.	It has Additional benefits such as hotel night awards, waived checked bag fees, and airport lounge access
Higher interest rates on average	Lower interest rates on average.
They do not provide extended warranties	Most traditional credit cards provide extended warranties
They do not have an annual fee	They have an annual fee

Table 4.1.1: Difference between Store cards and Credit Card

Conclusion

In the retail sector, a credit facility is a system that gives a feasible option for customers to pay the amount after availing of the product. However, the credit facility helps improve the sales, service fulfilments executive needs to manage the customers' credit accounts.

Activity

Field visit for observation of cash handling and related precautions in a retail store.

Procedure

1. Prepare a checklist of the points to be observed during the visit to the retail store
2. Reach the store as per schedule.
3. Greet and interact with the Retail Order Fulfilment Assistant and observe:
   • Procedure for receiving the amount in cash
   • Procedure taken while processing debit/credit cards to accept payment
   • Procedure of credit account management
4. Note all observations, discuss with the friends finalize by confirming with the executive/Retail Order Fulfilment Assistant.
5. Prepare a report and submit

4.1.7 Retail Order Fulfilment Assistant's End of Day Reconciliation and Report

Introduction

In retail sales, a Retail Order Fulfilment Assistant is a person who collects money from the customers for the products they want to buy. In a retail store, a Retail Order Fulfilment Assistant is liable to perform cash point operations to convert an order of purchase into a complete sale. Usually, customers select the products they want and move to cashpoint for checkout. The Retail Order Fulfilment Assistant at the cashpoint scans the barcode of every product by using a barcode scanner and generates the bill for each order. Subsequently Retail Order Fulfilment Assistant accepts the bill amount in cash or cash equivalent (debit or credit card, e-wallet, etc.)

An end-of-day reconciliation is what the Retail Order Fulfilment Assistant does in terms of accounting. The Retail Order Fulfilment Assistant is provided with an initial till cash. The totally billed value is reconciled with each payment tender and tallied and a report is submitted by the end of the day to the Manager. This is known as end-of-day reconciliation.

Basic insights of end of day reconciliation

The Retail Order Fulfilment Assistant is provided with an initial till cash or floats cash, this cash comes with the required change to begin the day's cash transactions with ease.

The Retail Order Fulfilment Assistant is responsible to account for the daily transactions and tallying sales revenue with payment tenders (payments are also called sales proceeds) and reporting the same at the end of the day so that no discrepancies occur. This is known as end-of-the-day cash reconciliation.

What is an End-of-Day Cash Reconciliation Report?

The sales proceeds shall be reported by the Retail Order Fulfilment Assistant at the end of the day with a report including the date, sales revenue, types of cash tenders/payments received such as UPI Payments, Debit / Credit Card Payments, Bank Transfers such as NEFT / RTGS, etc. and cash

denominations specified for the total cash amount, and such report must be signed by the Retail Order Fulfilment Assistant who tallied the cash. This report is known as the end-of-day Cash Reconciliation Report. This has to be submitted by the Retail Order Fulfilment Assistant to the store in charge or the finance manager.

Key points to be mentioned in the report:

Opening Balance (Till cash):

Total Sale for the day: P

Payments made in Cash: A

Change provided using till cash

Cash Denomination:

2000X

500X

200X

100X

50X

10X

Coins

Payments made using CC/DC: B

Payments made using GV/GC: C

Payments made using UPI: D

Payments made using e-wallets: E

(A+B+C+D+E) = P

Fig. 4.1.4: Key points for cash reconciliation report

The cash collected through sales and the till cash provided to the service fulfilments executive at the start of the day (after calculating if it was used to provide change) should be mentioned in the report.

Importance of Cash Handling Process by Retail Order Fulfilment Assistant & Store In-Charge

After creating the detailed EOD cash reconciliation report, the Retail Order Fulfilment Assistant should deposit the report, cash collected and payment slips/gift voucher receipts with the store in charge or the finance manager of the store. The finance manager would receive reports and cash from several Retail Order Fulfilment Assistants. The finance manager then vets the reconciliation report and tallies it with the cash and other receipts received for all Retail Order Fulfilment Assistants and creates a report of his own which becomes the end-of-day reconciliation report of the entire store. This report is further tallied with the inventory management system to make sure no inventory losses were suffered during the said day.

Cash will be deposited in the bank by the store in-charge/Finance manager every day or every alternate day as specified in the store policy.

In case there is no change in the till, during a sale, the Retail Order Fulfilment Assistant may acquire change from the store in charge.

In case of discrepancies between tally notes and stored cash and tally notes and deposited cash, the missing amount will be debited from the store Retail Order Fulfilment Assistant.

In case of the excess amount, the reason has to be analysed and checked whether all the bills have been made properly and report such excess money with details to the store in charge.

Manual billing/other errors to Consider Before Making End-of-Day Reconciliation:

In case the point of sales system is non-functional due to any reason such as system failure or there are technical errors with the equipment, the store in charge will alert the Systems department or the store in charge immediately and report the same.

Permission must be taken from the store in charge to use manual billing during such situations.

All manual bills must be serially numbered and on filling out bills, the Retail Order Fulfilment Assistant will ensure the bill is dated correctly.

All manual bills must be carbon copied, with the carbon copy remaining with the stores on completion of sales.

The Retail Order Fulfilment Assistant must give customers the manually created bill as a receipt for sales. All manual bills must be updated in the system as soon as the POS system is restored. The Retail Order Fulfilment Assistant or store in charge will log the details of the manually created bills, along with their accompanying serial numbers, in the system.

Manual bills may be used if it is near closing time and end-of-day procedures have already been started. In this case, bills must be uploaded immediately when the system is started the next day and the first shift must upload a photo of the bill on WhatsApp as soon as this is completed.

Manual bills must be scored by the store in charge once they are entered. This will be done by using a rubber stamp marked "ENTERED" provided by the company. In the absence of a provided stamp, the store in charge will draw two lines & write "ENTERED INTO THE SYSTEM" between them.

The scored/cancelled bills will be signed by the person who entered the system.

The store in charge will take a photo of the bills and upload for information to the Accounts Manager as proof of sales alongside the system information.

Create a financial tallying end-of-day Report

Total Value of Sales by end of Day = Rs.

Credit Card sales = Rs.

UPI Sales = Rs

Gift Card Payment = Rs.

Cash Sales = Rs.

A should be equal to (B+C+D+E)

Take E alone and Check Cash by Denomination

500X

200X

100X

50X

10X

Coins

TOTAL

Steps for balancing the cash register

- Get the POS report: Before beginning to balance the cash drawer and accounting for any incoming cash flow, one needs to print or access a POS report that details how much one should have in the till. This is to break down totals by category, like cash, cheques, UPI, e-wallet, and credit card/debit card transactions.

- Count the cash: One should keep a consistent amount of money in the register at the start of each day or shift, such as 1000 rupees. This ensures that one has enough cash to give a change to the customers. While counting the till at the end of each shift or day, count the cash and total up the checks, credit card receipts, and other transactions. Be sure to also deduct the starting cash balance from the current cash balance (e.g., subtract 1000 rupees).

Receipts	Sales	Total
Beginning Cash		1000 rupees
Cash Sales	5000 rupees	
Credit Card Sales	6000 rupees	
Total Sales		11,000 rupees
Sales on Credit		0
Cash Received		6000 rupees
Total Cash in Register		7000 rupees

Table 4.1.2: Sample chart shown for balancing cash register

After totaling up the credit card receipts, cheques, and cash, compare the totals to the POS report to see whether they are matching or not.

Iron out discrepancies: When balancing the cash drawer, look out for both overages and shortages. An overage is when the drawer is over the amount of the POS report. A shortage is when the register's total is short.

Shortages could mean cash was either lost, stolen, or counted incorrectly. An overage typically means the customers were short-changed.

When trying to resolve discrepancies, complete the following steps:

- Recount the cash, cheques, coupons, credit card receipts, etc.
- Check-in and around the drawer and register for missing information (e.g., receipts or currency notes)
- Review POS transactions for information, such as credit card transactions (if applicable)
- Record cash drawer transactions-

After counting the drawer and checking out for any discrepancies, record the cash drawer transactions in the books.

When recording cash register totals, be sure to account for the beginning balance (e.g. 1000 rupees). Record any cash, credit, store credit (if applicable), checks, coupons, and other sales in the books.

Take a look at an example of a balanced cash register below:

	Money Collected	(in rupees)	Sales Recorded	Difference (+/-)
Cash collected	425.00	Cash sales	425.00	0.00
Cheques collected	53.25	Cheque sales	53.25	0.00
Store credit collected	233.55	Store credit sales	233.55	0.00
Credit cards collected	657.48	Credit card sales	657.48	0.00
Coupons collected	11.00	Coupon sales	11.00	0.00
Total collected	1,380.28	Total recorded	1,380.28	0.00

Table 4.1.3: Balanced cash register

Take a look at a drawer with some discrepancies.

	Money Collected	(in rupees)	Sales Recorded	Difference (+/-)
Cash collected	350.00	Cash sales	367.78	-17.78
Checks collected	85.33	Check sales	72.55	+12.78
Store credit collected	247.52	Store credit sales	247.52	0.00
Credit cards collected	776.38	Credit card sales	776.38	0.00
Coupons collected	0.00	Coupon sales	2.50	-2.50
Total collected	1,459.23	Total recorded	1,453.95	+5.28

Table 4.1.4: Example of a cash register showing discrepancies

The drawer above is missing 17.78 rupees in cash and 2.50 rupees worth of coupons.

How to go on to balancing drawers-

• Have one person per drawer: When it comes to your cash drawer, the fewer people who access it, the better. Limitations allow you to avoid cash drawer discrepancies and can help you avoid workplace theft.

• Assign duties: For accountability purposes, assign one or two trusted employees to balance the cash drawer(s). One person can be assigned to count the drawer while another employee prepares the bank deposit. Have employees who manage cash drawers sign a report indicating they balanced the drawer. At the beginning of the next day or the following shift, recount the cash in each drawer to verify that the beginning balance is accurate.

• Utilize sales report: Sales reports can help in:

- o   Avoid having too much cash in a drawer
- o   Verify if a customer was short-changed
- o   Pinpoint employee theft
- Deposit cash during the day- If one finds the cash drawer overflowing throughout the day, make multiple small deposits into a safe or bank to keep the till's cash count down. Depending on the size of the business and the incoming cash, one might need to make multiple deposits throughout the day. If the business is smaller, one can likely skip this step altogether.
- Look out for consistent discrepancies- Watch out for patterns, such as routine shortages. For example, if you notice an employee's drawer is constantly off 20 rupees, there is a need to do some more digging and observing.

4.1.8 Skill Requirement for a Retail Order Fulfilment Assistant

A retail Retail Order Fulfilment Assistant must have the following skills to perform duties at the service cash point/POS:

- Knowledge of Store Policies and Procedures: The Retail Order Fulfilment Assistant must have knowledge of cash point operation and equipment.
- Knowledge of Handling Point of Sale Equipment: The Retail Order Fulfilment Assistant must be skilful to operate cash registers, cash drawers, scanners, card-swiping machines, etc.
- Communication Skills for Customer Interaction: The Retail Order Fulfilment Assistant must greet the customer, and provide information related to price confirmation, delivery inquiries, reward point inquiries, etc.
- Knowledge to Process Various Payment Modes— The Retail Order Fulfilment Assistant should know about cash exchange the process of accepting cheques and the processing of credit cards/store cards, smart cards, returns, exchanges, gift vouchers, etc.
- Knowledge of techniques: The Retail Order Fulfilment Assistant must have the technical knowledge of effective packing and wrapping products, like the use of boxes, bags, paper, bubble wrap, and gift packing, etc.

4.1.9 Roles and Responsibilities of Retail Order Fulfilment Assistant

A Retail Order Fulfilment Assistant has the following duties to perform at point-of-sale:

- Acknowledge customers in a respectful manner.
- Scan products in an accurate and efficient manner.
- Process utility payments and lottery purchases as per store procedure.
- Inform customers of in-store promotions, pricing specials, etc.
- Manage customer flow at cashpoint by calling for additional Retail Order Fulfilment Assistant or supervisor assistance.

- Answer incoming calls to front cash and redirect to other departments as requested; take and deliver the message when required in a prompt manner.
- Assist with customer inquiries and call for assistance when needed.
- Process returns as per the store policy.
- Ensure the cash area is kept neat, tidy, and well organized.
- Ensure staff and customer safety by addressing or reporting potential barriers or hazards on store property.
- Anticipate and communicate the request for cash pulls in a timely manner as per store guidelines.
- Communicate with the Front-End Manager, Supervisor, and/or Management regarding any issues that require follow-up or attention.
- Complete any additional duties as required.
- Complete all required training modules.
- Demonstrate a strong sense of customer service.
- Maintain professional image, including complete uniform, name tag, and proper grooming.
- Possess strong communication skills and attention to detail.
- Ability to work flexibly in shifts.
- Possess strong organizational skills.
- Possess team player approach with others.

Equipment and tools a front-office Retail Order Fulfilment Assistant needs for executing business operations

- Computer with PMS
- Laser Printer
- Barcode scanner
- Demagnetizer to remove security tags
- Credit card imprinter/ EDC Machine
- Safe vault/ Cash drawer
- Safe deposit lockers for guests
- Cabinets to keep files

A Retail Order Fulfilment Assistant has the responsibility to prepare a report of day-to-day activities and reconcile the total sale every day. To prepare the report on cashpoint operation he takes assistance from the Point-of-Sale system.

Conclusion

A retail store Retail Order Fulfilment Assistant is a person who performs a series of subsequent processes. Since the Retail Order Fulfilment Assistant manages many tasks at a time, hence POS system assists him in efficiently managing such tasks. POS security system facilitates the Retail Order Fulfilment Assistant to keep a record of cash transactions and daily sales reports.

Activity

Field visit for observation of point-of-sales and related precautions in a retail store.

Procedure

1. Prepare a checklist of the points to be observed during the visit to the retail store
2. Reach the store as per schedule.
3. Greet and interact with the Retail Order Fulfilment Assistant and observe:
    a. Recognize the designation of the person receiving payments from the customer
    b. Identify the job role of the person
    c. Observe the system he is using
4. Prepare a report on that person and submit

UNIT 4.2: Processing Returned Goods

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Why returns occur
2. What all to include in the return and refund policy
3. Steps of processing returned goods
4. List the constituents of return and refund policies
5. Explain the return and refund processing of CODs and pre-paid
6. Explain how to process the return of orders

4.2.1 Assisting Customers while Returning Purchased Goods

A retail return occurs when a customer brings a purchased item or items back to a Retail Order Fulfilment Assistant in exchange for a refund, store credit, or similar item. For example, a customer might return a pair of jeans because it is too tight or a pair of shoes because they are too large. Nearly 75% of Retail Order Fulfilment Assistants agree that returns are a necessary evil. It is a part of doing business that often goes neglected but has a massive impact on the brand.

When returns are done right, it can improve customer lifetime value and retain revenue. On the contrary, if it is done wrong, it can lead to lower customer loyalty and satisfaction.

Why do returns occur?

• Post-Purchase Dissonance: Post-purchase dissonance refers to the customer's level of dissatisfaction after buying a product or service. If the customer feels the quality of the product fails to meet expectations, they may become regretful. A buyer may find another product with a better price or value for money. In such situations, the customer reaches out to the company for a return/refund

• Fitting issues in garments - Customers return products such as garments if it does not fit them properly or as per their liking. Sometimes, a panic buy or a garment that wasn't tried out properly by the customer at the store comes back to the retail outlet to be returned

• Item defect Customers can return their products if they find some defect with them which might have got unnoticed such as a manufacturing defect or lack of colour fastness or by having been soiled in the shop.

4.2.2 Importance of Managing Returns

Returns are an easy way to disappoint customers and lose their loyalty. Some 95%say a poor returns experience will make them less likely to shop with a brand again. It can make them frustrated and lose trust in the brand or the company.

• It can have hidden benefits- Managing returns the right way can save time and money.

• Customer- Customer loyalty is built through better engagement with them. Nearly 74% of consumers feel Retail Order Fulfilment Assistants' returns experiences need to improve. Focusing on your returns process can help you stand out from competitors.

• Brand- Nearly 72% of customers share negative reviews about bad return experiences. This impacts the brand perception and can lead to lost future revenue.

4.2.3 Ways of Assisting Customers Effectively while Returning Purchased Goods

- Choose a reasonable return period: Consumers have multiple Retail Order Fulfilment Assistants to choose from when making their purchasing decision, and one of the factors they will consider is an item's return ability. Crafting a return policy that consumers are comfortable with will help put shoppers at ease about buying from a store.

- Write the return policy.

> **CASE STUDY**
>
> A recent University of Texas-Dallas study published in Science Daily shows that leniency in retail return policies directly affects return rates. The research demonstrates that if a Retail Order Fulfilment Assistant wanted to curb returns, longer deadlines (i.e. a 90-day return window versus 30 days) to make a return were more effective. This flexibility in the return deadline reduced return rates.

A formal policy helps to communicate returns management to customers and employees and the basics should be covered:

- What items can be returned?
- What items can be exchanged?
- What products are "final sale"? (i.e., non-returnable, non-exchangeable)
- When things can be returned or exchanged? (i.e.. 30, 60, or 90 days past the purchase date)
- In what condition can items be returned? (i.e., lightly worn, with tags still on, original packaging, original condition, etc.)
- What products can be returned for? (i.e., store credit, refund, a product of equal value, etc.)
- How to initiate a return or exchange? (i.e., an email address to contact or a web page to visit
- Offer multiple return methods: Empower the shoppers by providing multiple methods for returning, beyond the hassle and wait of returning by mail. This can include returns to the stores or in-person returns to a third-party network. Neither of these options requires a box or label, and both offer the shopper an immediate refund or exchange.
- Automate exchanges: Reduce refunds by making exchanges as effortless as possible, and give the customers plenty of opportunities to choose this option on their own. Using software can proactively offer exchanges based on the shopper's return reason, or automatically show them other options by size or colour based on available inventory.
- Offer a free return option: Customers may feel privileged about at least making the return free of cost.
- Keep the return policy hassle-free: Be flexible about the documentation required (i.e. receipts, tags, etc.)A no-hassle return policy can also help in putting shoppers' minds at ease. In e-commerce, particularly, knowing returns are easy and convenient helps mitigate customer indecision, leading to more sales.
- Practice empathy: The biggest way to maintain a positive customer experience is to simply show empathy. For example, train the staff to ask how they can make it right, especially if quality or satisfaction discrepancies caused the return.

No one wants to deal with a painful returns process whether something is sold online or in-store. As a Retail Order Fulfilment Assistant returns should be made as easy as possible. If packages take a long time to return to the warehouse, or refunds take forever to process, it can hurt customer retention and loyalty.

Online shoppers cannot touch or feel fabric, see colours or textures, try stuff on, etc. In-store shoppers

may find the product wasn't for them once they get home. Either way, customers expect the returns and exchange process to be quick and easy. Therefore a seamless returns policy is the need of the hour.

CASE STUDY

51% of consumers said the ability to check out online and return items to a physical store had a very significant or significant influence on their decision to order a product online. 44% of brands said they planned on prioritizing this.

According to a commissioned Forrester Consulting study conducted on behalf of Shopify

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Activity

A customer has come to your store for returning the pair of trousers he had bought. Demonstrate the steps needed to assist the customers in returning the product.

4.2.4 Following Company Policies for Return, Replacement, and Refund

In retail, a product return is the process of a customer taking previously purchased merchandise back to the Retail Order Fulfilment Assistant and in turn, receiving a refund in the original form of payment, exchange for another item (identical or different), or store credit.

Many Retail Order Fulfilment Assistants will accept returns provided that the customer has a receipt as proof of purchase and that certain other conditions, which depend on the Retail Order Fulfilment Assistant's policies, are met. These may include the merchandise being in a certain condition (usually resalable if not defective), no more than a certain amount of time has passed since the purchase, and sometimes that identification is provided (though usually only if a receipt is not provided). In some cases, only exchanges or store credit are offered, again usually only without a receipt, or after an initial refund, the period has passed. Some Retail Order Fulfilment Assistants charge a restocking fee for non-defective returned merchandise, but typically only if the packaging has been opened.

Return & Refund Policies are policies that describe a business's process, policies, and requirements for accepting returns. People are often hesitant to buy online, which can lead to low conversion rates and sales. Return and refund policies for e-commerce stores have been proven to increase the number of people who end up making a purchase once they're on the website. With e-commerce, the customer usually decides independently if they want a return (which signifies a refund) or an exchange (usually for a gift card or a replacement product of equal value).

If a customer wants a return, they are communicating that the product did not meet their expectations for one reason or another and want a refund. An exchange, on the other hand, means that they were satisfied with the quality of the product and the buying experience, but chose the wrong item.

4.2.5 Constituents of Return and Replacement Policy

- Keep the language of the policy clear and simple: The Return and Refund Policy should be good to go as long as it is ensured that the writing is clear, concise, and not open to interpretation.
- Time frame for returns: Typically, eCommerce stores offer a 15 to 30-day window in which customers can return a product and ask for a refund. Some businesses extend that period up to 90 days.
- Conditions of accepting returns: Every return and refund policy will have certain conditions in which returns, and refunds will be accepted. For instance, Burrow states that its customers are subject to a 20 percent service fee if returns are not in the original packaging.
- Return requirements: For example, all products should be returned unopened and in their original packaging, that's something we should state explicitly in the Return and Refund Policy. Other common conditions include things such as customers needing an:
  - Authorization number
  - Purchase receipt
  - Shipping address

A system to handle returns, which has become common in recent years, is a Return Merchandise Authorization (RMA) system. This system allows asking the customers, for information and images of the products they wish to return. Once the information and pictures are reviewed, we can choose to either accept or deny the return. It also allows providing the customers with a shipping label once authorization is made.

- In-store credit or refund: A best practice is to provide a full refund as long as the customers meet the Return & Refund Policy's requirements. Of course, we can always offer in-store credit under exceptional circumstances or for specific types of returns.
- Fees associated with returns: To prevent customer dissatisfaction, by requiring them to pay for return shipping, ensure that it is clearly stated that no such requirement is needed.
- Displaying return and refund policy: To save time dealing with customers who have not seen the policy, including links to it in several places on the website that are easy to find.

Key places to put links to the Return and Refund Policy:

- FAQ page
- Checkout page
- Shopping cart
- Product page
- Website chat tool
- Website's footer

Remember that when it comes to eCommerce stores, a Return and Refund Policy may be the most read document on the website. This policy is not only a way to explain the return process and requirements, but it's also a way to make a good impression on the business organization.

4.2.6 Return and Refund Procedure of COD Orders and Pre-paid Processing

When the customer does not find products fit for use due to any reason, then they are provided the option of returning the products within a specific timeline. If the product is replaced, then the Retail Order Fulfilment Assistant provides the new product and takes back the older product from the customer.

But if the products are actually returned, then the refund processes for those orders get initiated.

Refund procedure of COD order;

When the customer has made payment in cash and requests for refund, then the Retail Order Fulfilment Assistant visits the customer's shipping address and takes the products back. After a few hours, the refund request gets initiated. In processing the refund request, the refunds are provided to the customers through two mediums:

• Refund in the wallet: The customers are given the option of a wallet on the website through which the retail store sells the products online. In the case of refund processing, the Retail Order Fulfilment Assistant credits the refund payment in the wallet that the customer can use further. The only restriction with the wallet is that the customers become obliged for using the wallet money on that website only.

• Refund through the website: There are a few retail stores that do not provide the wallet service. Instead, the customers are sent a message and request to update their banking details on the dashboard of the website. Once they enter their banking details in the dashboard, then the Retail Order Fulfilment Assistant processes the refund request and credits the money to the respective bank account of the customer.

Activity

Visit the website of any popular e-commerce store, and carefully read its return policy and exchange policy. Make a note of your top 10 observations from it.

4.2.7 Processing of Returned Goods

Returns management, sometimes referred to as reverse logistics, is the process by which an end-user returns an item for any number of reasons. They may return shoes that didn't fit, a laptop that wasn't working, or glassware that was broken.

Following are the steps for processing returned goods in store-

Step 1: Verify product returns request- When a customer brings an item to the store and asks for an exchange or refund, the sales staff needs to verify this request. They will have to confirm that this product has been purchased from the particular store. The most common proof is a receipt. For some products, there are additional conditions. For example, with video games, the original packaging has to be intact. Clothing items might need their tags and labels still on and show no sights of wear or stains. In some cases, the customers may request a return without a receipt. They can still show some proof like a bank statement or confirmation email. If the customer is eligible for a refund or exchange, the Retail Order Fulfilment Assistant will create a return request in the system.

Step 2: Create a return request- To process an in-store product return, the staff usually has to find the past order in the point-of-sale system. Different systems will offer a variety of options to find this order such as:

- Scan the customer's receipt
- Input the order ID or number
- Search for the order with customer or product information

The Retail Order Fulfilment Assistant can then select the order and start the return process. They'll have to select the products in the original order and the quantity to return.

Step 3: Process payment & complete return- In the case of product refunds, the Retail Order Fulfilment Assistant will have to refund the payment to the customer. Different POS systems might offer the following options:

- Refund by original payment method. Most customers prefer to get a refund via the original payment method. Some POS systems let to issue payments while others require extra steps on the payment device.
- Refund by cash. If the customer paid for the original order in cash, they might expect a cash refund.
- Refund by points or vouchers. Some stores offer refunds in the form of points, store credits, or gift cards. The Retail Order Fulfilment Assistant can add the refund value to the customer's account or gift card balance. The customer can use the balance the next time they purchase from the store.

Refund by Credit- A credit note is a credit bill given to the customer for the value of goods returned which can be used as cash tender during the next purchase. A credit note acts like a voucher that can only be used for the particular shop, the chain of shops, or the business that issued the credit note. If the buyer hasn't paid the Retail Order Fulfilment Assistant yet, the credit note can reduce total liability. If the buyer, however, has already paid the entire amount of the invoice, the buyer can decide whether to use the credit note to offset future payments to the Retail Order Fulfilment Assistant or they can use it as a demand for cash payment in exchange or the credit note.

Step 4: Complete in-store product returns- Once payment is complete, the staff should also note down the reasons for return. When the staff completes the return request, the POS should synchronize data with the rest of the system. There should be updated in the original order, revenues, profit, tax, and so on. In some systems, product returns information will appear directly in the original order.

Step 5 (optional): Return the item to inventory- Most POS systems allow returning the item to inventory. When the return process is complete, the quantity of the returned items will be added back to the inventory. Depending on product conditions and the business rule, these items can be resold as open boxes or refurbished products.

Retail Order Fulfilment Assistants can turn in-store product returns into a good shopping experience for customers and get valuable data along the way.

A POS system is the key to implementing and optimizing this process. It should help to handle order history, payment, customer, loyalty programs, and more.

Activity

A customer returned a shirt that was torn. Demonstrate the steps of the return process.

UNIT 4.3: Processing Customer Orders in a Retail Environment (Multi-channel/Omnichannel)

Unit Objectives

By the end of this unit, the participants will be able to:

1. How to process the customers' orders
2. Explain the backend processing of customers' orders
3. How to share information with the customers
4. List the communication methods that facilitate in sharing of information with the customers

4.3.1 Processing Customer Orders for Goods

Processing customer order for goods is the order process management. This management helps an organisation to manage and process customer orders for goods. It makes the processing of customer orders for goods smooth and accredited.

4.3.2 Customer Order

A customer order is a formal order from the customer to the business. It consists of a set of instructions for businesses to purchase goods or services. There are three types of customer orders:

• Verbal customer order

• Written customer order

• Online Order

The order provides the details of the product name, amount, quantity, and due date for a customer's requirement of products.

• Need of customer order: Customer order showcases the evidence of customers' needs for products. It helps the Retail Order Fulfilment Assistant process customer orders for goods.

• Processing customer orders for goods: When it comes to processing a customer order for goods, an organization adopts an order management process.

Order management is a process that keeps the record of customers' orders and executes the order stack in a sequence. This management process uses the first in first out (FIFO) method to fulfill customers' demands. Features of order management are as follows: -

• It is a background process

• It keeps track of all customers' order

• Execute orders in a sequence

This process management contains the following information to maintain the record of customers' orders -

• Customer's order list
• List of accepted orders
• List of rejected orders
• List of Cancelled orders
• Customer's order details
• Packaging and shipping
• Delivery report

Fig. 4.3.1: Order placement process

The customer order management process starts with order placement. There are two ways a customer uses to place an order
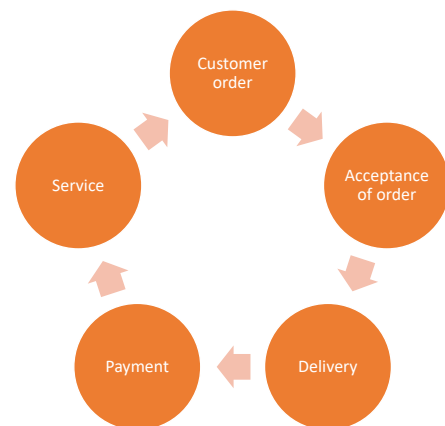
1. Online
2. Offline

Once the business receives a customer order for goods, it starts the order management process. Customer order management executes the following sequence: -

• Reviews the customer's order
• Send the order to the store's inventory
• Analysis of product availability in store
• Approve/Decline order (on basis of product availability)
• Send product for packaging
• Send packaged product to logistic
• Update customer on product status
• Ensure customers are delivered the product

Fig. 4.3.2: Steps involved in order process

This order process management keeps the record of each order processing stage and sends updates to the customer.

Significance of processing customer orders for goods

Processing of customer orders for goods is essential for business because it: -

• Track of orders
• The delivery of orders.
• Maintains orders and delivery acknowledgments and sends them to the customers.

Conclusion

In the business world, there is no scope for a single mistake. So, every business entity must adopt the effective processing of customers' orders for goods.

4.3.3 Backend Processing of E-commerce Orders

E-commerce stores generally sell products online. The orders whatever the retail store gets, are processed properly so that all products could be sold on time. The orders are processed through the several stages which are provided below:

• Order management system
• Inventory management system
• Warehouse management system
• Enterprise resource planning

There are certain steps that are followed for processing orders which are explained below:

• Step one – Firstly, when the customer places an order for the products that can happen due to online, offline, or the customer service representative. The details that the customers put into getting stored in the order history. The stored information is transmitted to the warehouse. The warehouse department receives all details regarding customers' orders.

• Step two – The Retail Order Fulfilment Assistant checks the availability of the order in the warehouse. If the products are presented in the warehouse, then the process of packaging the products gets started. Also, if the Retail Order Fulfilment Assistant feels that the inventories are not in the warehouse, then the request is sent to the purchasing department so that they can start purchasing inventories.

• Step three – On continuation of packaging of the products, the details of the order are sent to the accounts department. The accounts department generates the invoice and collects the payment from the customers.

• Step four – The delivery agents collect the products from the warehouse and then deliver that to the end-level customer. Or if the delivery agent is not available, then the Retail Order Fulfilment Assistant himself/herself delivers the products to the customers.

Activity

Mr. X visited your store to place an order for a customized T-shirt. But your store does not have customized T-shirts. So how will you assist him?

4.3.4 Keeping the Customer Informed

Introduction

Business information means any information or compilation of information, which conveys a business. A business entity has several types of information. This information is:-

• Business level information
• Customer level information

Business-centric information is the information related to the business. Such information does not need customer engagement, such as staff salary increments, bonuses, or promotions. Customer engagement information is the information that needs customer engagement, such as Discounts on sales. A business entity needs to share such customer-centric information with its clientele.

Information share with Customer

Information shared with customers means providing accurate information to the relevant customers. A business entity has the responsibility to deliver accurate information to its customers. Usually, business organizations share the following information with their customers: -

• Business activities such as selling, promotional schemes, and discount
• Updates on product delivery
• Problem to fulfil a customer's request
• Change in business policy that affects the interest of its customers

Business information shared with customers builds a fruitful relationship between a business entity and its customers.

Importance of sharing information with Customer

A business organization needs to share accurate information with its customers. It has the following signs for a business and its customers to share relevant information: -

• It builds business rapport with the customer
• If the business entity is facing a problem to meet its customer's requirement, then sharing this information help both parties (entity, customer) to stay connected.
• The customer gets an update on his order

A business needs strong communication to deliver useful and relevant business information to its customers.

Communication method to share information with a customer

Advertisement is an effective medium to notify customers about business intent. It helps a business to increase its customer base. Usually, a business entity uses various mediums to inform the customer about its business intent. These mediums are:

• Print Media: Print media is the oldest and most basic form of communication. It facilitates the following platforms to relay business intent
   o Newspapers and Magazines (This is not print media)

- o Pamphlets
- o Posters
- o Billboards

- **Digital Media:** Digital media refers to the technology which uses an electronic machine system to broadcast any information. Business organizations use this media to share their business intents with customers. Usually, business entities adopt the following digital platforms: -
    - o Television
    - o Internet
    - o Phone calls and messaging

- **In-Store Media:** Retail stores use In-store Media to directly connect with their customers. It is an instant method that helps retail stores to convey their business and its objectives to customers in minimum time with less investment. In-store Media is the only marketing medium that instantly shows its impact on customers with the increment in sales. For promotion purposes, retail stores display advertisements by using the following mediums such as:

    - o Shelf-talkers- They are printed advertisement materials made of plastic cards, papers, and cardboard. Shelf-talkers talk about the specific items and products, and they are attached to the shelf where those items are placed. By their creative appearance and attractive colours, they grab buyers' attention towards those items.

Fig. 4.3.3: Shelf talker

    - o Tent-cards- Tent cards are widely used promotional cards. These cards have a tent-shaped structure that is meant to keep at desks or counters at stores. Tent cards display information about new products, special offers running in the store, upcoming events, etc. They are used to showcase the latest information on the stores' products in a limited space.

Fig. 4.3.4: Tent card

    - o Standees- Standees are big promotional standing display cards. They are used at big retail stores to advertise their products. Their large structure and fonts catch shoppers' attention at the store. They are mainly used to promote the new arrival of items or services, specific brand products, discounts on seasonal sales to customers, etc.

Fig. 4.3.5: Standee

    - o LED Screens- Retail stores use LED Screens as an electronic advertising medium to display their products or services to customers. These LED Screens displays static or video advertisement with high-definition colour quality, which attracts every buyer's attention at once. These screens are usually used at big shopping centres and malls where they are placed either at the entrance or in an open space to get easily visible to buyers at a time. LED Screens mostly display the stores' offers and new items. Nowadays. It is a modern and preferred medium to quickly grab buyers' attention.

Fig. 4.3.6: LED Screen

Format to share business intent with customers

A business organization has different types of customers. All customers have different needs and demands. A business must deal with various challenges to convey relevant intent to customers. These challenges are: -

• Language barriers
• Age
• Disabilities

Business entities take to support the following formats and standards to deliver the relevant information to their customers. These formats include: -

• Captions of broadcast program material to provide visual information for customers who have a hearing problem.
• Described video to provide synchronized descriptive verbal information for customers who have eyesight problems.
• Language translator to convey the information in the customer's language.

These formats help a business to build effective business relations with the customer.

Conclusion

Information shared with a customer builds the credibility of the business. It helps a business organization in building a strong relationship with its customer. It simplifies the prime objective of a business entity to expand it.

Summary

- Cash transaction Procedure
- Prepaid processing in e-commerce
- Credit payment transaction process
- Managing customer credit accounts
- End of day reconciliation and report
- Managing returns of purchased goods
- Constituents of return and replacement policy
- Return and refund procedure of COD orders and prepaid processing
- Processing customer orders
- Backend processing of e-commerce orders
- Sharing information to customers

Exercise

1. In retailing, the payment may be in the form of _____
   (a) cash   (b) cheque

   (c) credit card   (d) All of the above

2. What are the services offered to customers at the service cashpoint?
3. Bhumika visited a supermarket and bought clothes but forget to carry the cash, what can she do in such a situation?
4. Sohan visited a store and picked clothes to buy. The bill for his shopping was Rs. 10000 but Sohan had only Rs. 5000 in hand. In such a situation what would you suggest to him?
5. Ram visited a supermarket and bought some groceries, at the billing counter he made the payment with his debit card, and the amount was deducted from his account however, the POS machine showed the transaction failed. How could he deal with this situation?
6. Ram is standing at the cashpoint. He is scanning the barcodes and takes payments in cash or through credit and debit cards. What position would you assign him?
7. Mohan is telling customers about in-store promotions, and pricing specials, meanwhile he is managing the issues of refunds. Define the store's expectations from Mohan.
8. Explain how having clear and consistent returns policies enhance the productivity of a business and the customer experience.
9. Mention the differences between return of a product and an exchange of a product.
10. You have to refund a product returned by a customer. What are the different refund options available for a Retail Order Fulfilment Assistant?
11. Which process is not a part of processing customer orders for goods?
    a) Order placement   b) Pick summary

    c) Packaging   d) Shipping

    e) Store redesigning

12. Why processing customer order for goods is necessary?
13. How does an inefficient order process management effects business?
14. SBZ store is a departmental store. It sells all types of goods and services. The store has decided to launch a 'week of bumper sale offer'. This week will start from 1st Jan2022 (00:00 AM) to 7th Jan 2020 (11.59 PM). How will you assist the store to share this information among its existing customers?

Notes

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5. Creating a Positive and Lasting Impression of Self and the Organization in the Customers' Minds

RAS/N0124

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain the need to establish an organizational image
2. Demonstrate customer Handling process
3. Explain complex information to customers
4. Build relationships with internal and external customers
5. Create customer database

UNIT 5.1: Sharing Correct Information with Customers and Staying up to Date with Product Information

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the basic meaning of communication
2. Explain the appropriate criterion for sharing the correct information with customers

5.1.1 Effective Communication for Building Good Relations

As we know that effective communication is vital for building good relations with the customers, it is also equally important to be assured of the fact that whatever is being communicated is clearly understood by the customers.

In any customer-facing industry, it is great when we have simple answers to the customers' questions. "Is my order ready yet?" Yes. "How can I view my transactions?"

Resolving support requests so quickly minimizes the drain on the resources and keeps the customers happy — but simple answers are not always possible.

Explaining and interpreting complex information to customers could be a major challenge. The customers can misunderstand what has been said, leading to further confusion, or simply find it impossible to digest. This can ruin the vital reputation of a business organization.

When there is complex information to be conveyed, then, we need to get our approach right. Following are some of the ways in which the right approach and positive outlook can garner more vital customers.

For example, if customers must be informed about assembling a computer, follow these steps-

1. Ask them to mount the processor
2. Fix the motherboard in the tower case
3. Connect the power supply
4. Install the drives
5. Connect the cables
6. Mount the memory modules
7. Install the internal cards
8. Cover the tower
9. Connect the external devices and power

- **Break it down into parts:** First understand, what is going to be conveyed to the customers. If any information must be passed, start with simple knowledge and then build up. Define the terms, lay the groundwork, and add the layers until what should be covered is done. This will reduce the likelihood of a customer giving up halfway through.
- **Build a knowledge base:** Sometimes it can happen that the information passed to the customers can be very difficult to understand, and they might hesitate to ask any questions. Thus, building up a knowledge base is important to empower the customers to help themselves set out information in a structure that is searchable and straightforward to guide them to what they need.

- **Avoid using any jargon:** Eliminate any terms that the customers might not understand and replace them with simple and clear language. Using jargon is something that does not go with popular opinion because a Retail Order Fulfilment Assistant can expect customers of varied types. Thus, using a language that is balanced will be well applauded by the customers.

- **Create a picture:** Taking a picture to explain a complex idea is a classic solution. Pictures can be made using photoshop or InDesign, PowerPoint, emoji, etc to create pictures of the breakdown of the complex idea into parts.

- **Create explainer videos:** The core appeal of the video format is that it catches the eye and provides exceptional creative options, and it can help to simplify an awkward topic. It is possible for a 30-second video to do a better job of making something clear than a 3000-word article- also because people are likely to pay more attention to it.

- **Use stories to explain:** Telling the story of a user experiencing an idea, problem, or solution makes it real and approachable. Even if there is no real story to pick up at the right moment, consider creating some. These representative heroes can make the explanation friendlier and more accessible.

- **Leave space for sense-making:** For people to truly understand a complex idea, they need to relate it to their own lives, put it in a familiar context, and make it their own. Thus, it is necessary to leave space in explanations for them to think about what was just said.

Conclusion

In conclusion, then, conveying complicated information to customers is largely about breaking it down to make it as simple and clear as possible before presenting it in a way that is popularly accepted and convenient.

Activity

Find out some websites where you can do photoshop and design a video to explain the information of a product.

UNIT 5.2: Importance of Maintaining Records and Staying Relevant

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Describe the creation and analysis of database
2. Identify the uses of creating a customer database
3. Explain the ways to create a database

5.2.1 Creating and Analysing Database

To carry out a successful business venture in the long term, it is essential to work in a relationship with the customers. And one of the best ways to do that is to take advantage of the information we get from them. A Customer Database is a collection of information for each customer that is relevant to the business. Thus, a customer database can include contact data (mail, telephone, etc.) to specifications and details about the transactions performed. The type of information that we are requesting from the customers always depends on the utility that we have for the business and the marketing strategies. It allows to contact the customers, build loyalty, provide better service, and promote sales.

5.2.2 Uses of Creating Customer Database

The following are the uses of creating a customer database:

- **Increase sales** through techniques such as email marketing, telemarketing or telephone marketing, etc. (using information available in the customer database).
- **Retrieve old or undecided clients** by taking advantage of the remarketing strategies.
- **Offer personalized promotions** tailored to each customer based on their profile in the database (preferences in payment modes, purchases made previously, etc.)
- **Keep the customers and prospects informed** about novelties, special offers, etc.
- **Provide quality care**, that is possible thanks to the registration of the specific characteristics of each client in the database.

5.2.3 Ways of Creating Customer Database

The following points are the ways of creating a customer database:

- Capture customer data while billing, using the data fields available in the Point of Sales system.
- Conduct questionnaires and surveys via mail and through Social Networks (e.g. Twitter includes a function to do surveys easily).
- Request the email of your buyers, their address, and their phone as part of the purchase process.
- Make competitions (in business or through social networks) with prizes such as discounts or free kits of the products, which are required to participate in the registration of specific data (e.g. name, age, sex, city, email, Telephone, last product purchased, etc.).
- Include in the blog or website a field to enter email addresses, so that people, who want to subscribe to the newsletter and receive the offers, can easily do so when they visit the website.

- In case of selling occasional purchase products (e.g. ink for printers) enter the item, date, and time of purchase of each customer, and register it in their profile within the Customer Database (in this way we can estimate our Next purchase and get ahead with a convenient offer).
- Place forms in the store or business for the clients to enter their data, and accompany it with an "Enter Your Data to Receive Our Discounts and News" sign.

Activity

Demonstrate the process of creating a customer database.

UNIT 5.3: Understanding Customer Needs

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Identify Customer Needs for Products
2. Process Customer Orders for Goods
3. Inform the customers

5.3.1 Introduction

Business is the activity of selling and buying goods or services. It has two parties

A Retail Order Fulfilment Assistant

The customer

The person or organization that sells goods is known as a Retail Order Fulfilment Assistant. The Retail Order Fulfilment Assistant sells goods or services at profitable margins. There are the following two types of goods in the retail sector: -

• Durable goods (AC, tools, computer)
• Consumable goods (Food, laundry detergent, dish shop).

In the retail sector, all Retail Order Fulfilment Assistant takes orders from the customers and sells goods or services as per their need and demand.

5.3.2 Customers' Needs

It is the Customer Need that motivates the customer to purchase a product or service. The need of the customer changes with the changes in the market condition. Every Retail Order Fulfilment Assistant or business entity considers demand to the need of the customers. These things include goods or services such as durable goods, non-durables goods, and consultation.

5.3.3 Types of Customer Needs

To understand the choice and requirements of customers at the store, a Retail Order Fulfilment Assistant must understand the following types of customer needs.

• **Functional Needs:** When buyers need a product for a particular purpose that is going to affect their regular life then the buyer focuses on the functions of the products. A buyer sees whether the offered product or service functions in a correct way that would solve their problem and desires or not.

    For example, A buyer has asthma and wants to buy an air purifier. In that case, the person would make sure that the humidifier would work best for his problem and would not deteriorate it.

- **Social Needs:** Social needs of customers are more concerned with the social status a customer wants to achieve after buying a product. If customers want to buy a specific product, then most of the time they relate it to the perspective of society. They decide to purchase an item on the basis of how it would impact their image in society.

  For example, People usually tend to buy international branded clothes from the market over local brands, the social status the international brands bring along is the most important reason why people are more inclined towards buying and wearing expensive international brands

- **Emotional Needs:** Emotional needs are those needs that regulate a customer's inner desire, expectations, and attached feelings toward that particular item. A buyer may want to buy an item based on one's own comfort or the reason could be associated with some personal nostalgia.

  For example, A boy comes to buy a radio for his grandfather. The radio his grandfather once had is now broken. Now he wants to buy a radio which has advanced features and also resembles the vintage look as same as the one his grandfather earlier had.

5.3.4 Identifying Customer Needs for Products

Even though a customer knows what he wants, but sometimes unable to find it or wants more assistance. In such cases, every business has a responsibility to understand its customers' needs for products. Retail Order Fulfilment Assistant talks with his customers to understand their needs in the context.

A business uses several ways to identify a customer's need. These methods are as follows: -

- Focus Group: It is a technique of market research. In this technique, a business survey of a small group of the target audience.
- Social Listening: Social media platform helps a business identify customer need. Engagement of people such as liking, sharing, and commenting on social media platform help the Retail Order Fulfilment Assistant to recognize the customers and their need.
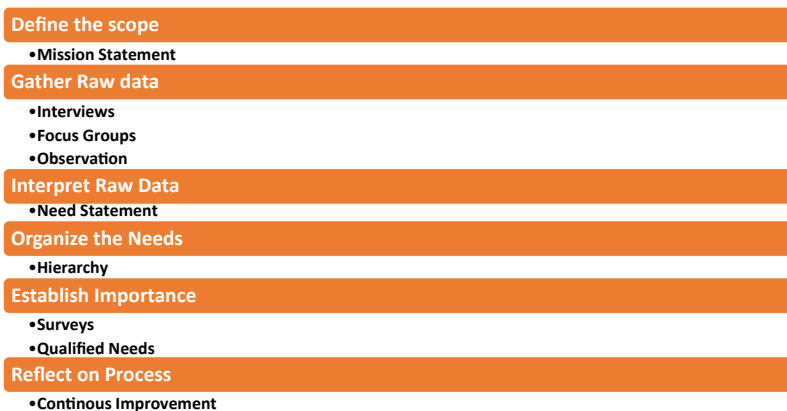
Define the scope
- Mission Statement

Gather Raw data
- Interviews
- Focus Groups
- Observation

Interpret Raw Data
- Need Statement

Organize the Needs
- Hierarchy

Establish Importance
- Surveys
- Qualified Needs

Reflect on Process
- Continous Improvement

Fig. 5.3.1: Way of identifying customers need

Whenever a business identifies its customer's need for the product, it uses some ethics of business communication. These ethics are: -

- Listen and pay attention to customer's request: A business needs to understand the demand and requirement of the product and desire. It helps the Retail Order Fulfilment Assistant identify the requirement of the customer. It helps the Retail Order Fulfilment Assistant identify the customer's

need for the product.

- Greet customers and ask the question: A business asks questions to understand the customer's requirements. It helps the Retail Order Fulfilment Assistant to identify the needs effectively. The Retail Order Fulfilment Assistant greets the customer with the use of positive language. A confident appearance and direct eye contact in a relaxed manner help the Retail Order Fulfilment Assistant to build a bond with the customer. It develops a fruitful relationship and makes the customer feel valued. It conveys to customers that express the problem at the right place and will get a solution to the problem

- Feedback: A business gives feedback, signals, and comments such as "Yes, I understand, I agree," along with eye contact and nodding. Feedbacks help a business identify its customer's need for product and build rapport with them. It ensures a customer that, the business has identified his requirements and will resolve them.

- Avoid distraction: Distractions such as phone calls, and colleagues' conversations create interventions, hence a business needs to avoid them and pay attention to the word and requests while listening to its customer.

- Take notes: Notes of business communication, with customers such as unusual names and numbers, are vital to identify customers' needs. It will help to maintain the record of customers who need assistance with the product.

- Assessing customer needs: A customer wants a complete assessment of his needs; hence business requires to use of effective question techniques. Usually, a customer wants assistance on: -
  - o Availability and quality/reliability of product/service
  - o After-sales service and backup
  - o Efficient handling of orders/services and queries
  - o Order convenience
  - o Competent technical technicians or staff
  - o Delivery time and reliability
  - o Provision of a pleasant environment
  - o Staff knowledge about products and services
  - o Enthusiasm of staff to help and assist politely
  - o Value of product/service.

This technique will ensure a customer that the business has identified his problem and will provide a solution efficiently. There are various competitive businesses. Each business has its clientele, and none of them wants to drop their customers because it affects the following business areas: -

- Number of clients
- Sales turnover
- Business growth

If a store fails to fulfil its clients' requirements, it will affect the business growth. In such a case, every business has a responsibility to identify its client's needs.

Activity

You're working in a footwear store. Suppose a lady of age of 75 is visiting your store for the first time to buy footwear. She's extremely hesitant and not comfortable asking for help.

As a Retail Order Fulfilment Assistant of a footwear store, demonstrate ways to make her feel comfortable and ask about her requirements.

UNIT 5.4: Communicating Effectively

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Discuss ways to improve relationship and communication with customers
2. Explain the need to maintain the balance between customer and organizational needs
3. State the significance of meeting and exceeding customer expectations and manage moments of truth

5.4.1 Improving Relationships and Communication with Customers

Good relations with customers are fundamental for the success of any business. Unsatisfied customers have a tendency to switch to competitors and never come back. Thus, it is imperative to communicate well with them to improve customer relationships.

Following are the ways to improve relationships and communication with customers-

- Collect and use customer data: Collect data that will help better understand the clients and offer them services. Use social and demographic information, preferences, and buying behaviour patterns to create efficient marketing strategies.

- Understand Customer Expectations: Customer expectations are any set of behaviours or actions that individuals anticipate when interacting with a company. Modern customers have much higher expectations such as proactive service, personalized interaction, and connected experiences across digital channels. Research has found that 80% of customers consider the experience a company provides to be as important as its products and services.

- Chose the right communication strategy: In the eye of a customer, a company's overall quality largely depends on the quality of its customer service. For that communication is very important.

- Do not let the clients forget the communication: Send the customers regular email updates, which is a simple, effective, and affordable marketing tool that helps to strengthen existing relationships. Send out a newsletter with special offers, useful information, or tips – stay in touch with the customers.

- Build loyalty: Do not try to maximize profits at the expense of customer satisfaction. On the contrary, build positive and friendly relationships that are beneficial for both sides.

- Use modern technology to the advantage: Use cloud-based CRM solutions that are flexible and scalable that will help adapt to the requirements and grow alongside the business. In addition, it helps to get valuable information that is safely stored and available anytime we need it.

- Make contracts clear: Keep the contracts crystal clear so that the clients know what to expect. Contract transparency can help both parties define and improve communication, attitudes, and understanding. When everyone knows and understands the contract they will all be more satisfied.

- Share Information: When talking about communication it is important to realize it goes both ways. Sometimes we need to also share relevant information with the customers to help them gain a better understanding of a product, process, or service. Tell them when deadlines cannot be met in fulfilling a service. Explain to them the reasons why things are done the way they are and they will trust you in all of their future dealings.

- Personalize customer interactions: Put an emphasis on treating the customers as individuals. This can be accomplished through frequent social media interaction, sending out personalized offers to customers on their birthdays, or sending out "thank you" notes after the agents close a deal.

- Request feedback from the customers: It is important to request feedback from the customers so that we can get a sense of how they're interacting with the product and whether or not they're liking the offer or not. We can gather this type of feedback by sending out something formal, like a survey email. We could also take the informal route, for example asking the customers for feedback in the comments section of the next Facebook post. The key here is to be creative.

Thus, it can be said that the improvement in the relationships with the clients is important for the current and future business well-being.

Activity

How will you be able to develop good relations with the following customers-

1. An angry man
2. An illiterate person
3. An unwell woman

UNIT 5.5: Address Customer Complaints

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Identify Customer Service Problems
2. Determine ways to find solutions to customer service problems
3. Demonstrate various ways to resolve customer service problems
4. Discuss different approaches for dealing with customers in difficult situation

5.5.1 Identification of Customer Service Problems

When customers buy a product, they show their trust in that brand or seller. The customer expects their whole support during the purchase and even in the future. If in the future, they face any problem then customer service is the only medium through which customers can convey their problems to sellers.

Customer service helps in resolving customers' issues regarding product failure, refund problems, delays in service or product delivery, etc. But the lack of ability of sellers or the customer service issues cause many problems not only for customers but also for sellers.

Impact of customer service problems

The following points are classified as the impact of customer service problems:

• It reduces sales.
• It sets a negative impression on customers.
• It causes customer loss.
• It wastes customers' time and money.

Understanding customer complaints

A customer can complain by telephone, e-mail, letter, review, and ratings, a customer feedback form, or direct interaction. By lodging a complaint, customers let a seller know about their dissatisfaction with the product, or service they received. To retain customers' trust, a seller or company must resolve their concerns within the time.

To handle customers' problems and concerns, the seller must be aware of the sensitivity of the situation. In such cases, it's the seller's responsibility to comfort customers and make them feel that they are important to the seller. During the entire process of interaction between customer and seller, the customer must get ensure that their problem will be resolved soon.

There are certain ways to behave while listening to customers' concerns:

• Do not interrupt customers while they are talking
• Stay calm and be patient with customers
• Listen and understand the whole situation
• Listen to the customer's point of view
• Pay attention to their body language, facial expressions, and voice tone
• Ask questions to gain further information or to clarify their point to get a proper understanding of the situation.

Ways to identify customer service problems

To grow a business, retailers must be aware of their customers' problems and ways to deal with them. There are some following ways that retailers must adapt to identify customer service problems.

- Directly ask customers- There is no one who can tell it better than experienced customers. It is a better choice to directly ask customers about the issues they're facing from the side of a business or seller. This is a direct and reliable method to find out the cause of their problem.

- Check online rating and reviews- If a business has an online presence that it can check its rating and review section. It is a platform where buyers write their true experiences.

- Talk to employees- Employees who deal with the customer service section of a business know the best about their customers. They know better than what type of issues are mostly coming from the customers' side.

- Conduct a survey for customers- Conducting a frequent survey is another way to find out customers' problems with a business's service.

- Customer Feedback System – Feedback can be collected through various means such as emails, phone calls, social media, etc. Through this, essential information can be gathered and corrections can be made. Employees will get to know more about their customers and help them in understanding them and reviewing their work.

- Mystery Customer Audit – Mystery customer audit is the art of evaluating customer services discreetly and professionally. It is a market research tool used externally by companies to measure the quality of service, compliance with regulation, or to gather specific information about their products and services.

Types of customer service issues

The types of customer service issues are provided below:

- Finding no attendant-When customers get stuck with some issues regarding a service or product failure then they need a skilled person to resolve their issues. But the shortage of skilled staff leaves customers unattended. They find no one to listen to their issues and their problems remain unheard.

  For example, A person comes to a retail store to buy a carpet and is unable to find the right section for it. The customer looks everywhere but no one is there to inform about the right place to look for the item.

- Slow response time-When customers recite their problems, they want the assurance to get a solution for their problem as soon as possible. But there are times when their matter does not get much attention from the company's side and they wait for a longer time.

- Poor report- The miscommunication or carelessness of staff conveys wrong information to customers. Customers get unauthentic and invalid information about their problems.

- Lack of medium or platform to connect- There are times when the lack of connectivity or skilled staff becomes problematic to customers. They find no place to lodge their complaint.

- Rude interaction of customer service staff-When customers try to reach out for support and to get solutions for their problems, sometimes a wrong interaction with staff can make their experience even worse. It builds a bad impression on the mind of customers.

- Bad Body Language - Body language can heavily influence how customers feel about interacting and so it plays an important role in customer service. Some examples of negative or bad body language include avoidance of eye contact, crossed arms, staring, bad posture such as leaning, staring at a phone while talking, etc, invading personal space, etc are certain examples of bad body language which must be avoided at every chance.

- Lack of empathy - Empathy in customer service means listening to what the customers have to say. A company has the power to make a positive difference in the customer's day, and in turn, create a loyal customer for life. One small act of goodwill can start a movement. And all it takes is a little empathy. The key to showing empathy is to always listen to the customers about what they are saying and respect their viewpoints as the company respects theirs.

Importance of identifying customer service problems

The following points reflect the importance of identifying customer service problems

- Identifying problems gives businesses an idea about their customers' feelings
- It enables customers to build and retain their trust in the business.
- Identifying customer service issues helps to understand customers and their requirements from the business.
- It gives businesses an insight to improve the quality of their products & services.
- It helps businesses to create a good and positive image for customers and in the market.

5.5.2 Solutions to the Customer Service Problems

Customer service problems can make a business lose its customers forever. When customers feel that there is no one to listen to and resolve their issues, they no longer believe in a business. It makes a highly negative impact on a business on customers' minds and in the market.

To minimize this impact and to retain customers for a longer time, it gets important to take care of their issues. A business or seller must find out the cause of their problems and determine solutions to resolve them.

Identify ways to resolve customer service problems

To solve customers' issues, one must understand the whole situation, its cause, and the effect of the problem on customers. It is extremely important for a customer service provider to listen to the whole complaint carefully and then search for a solution. For that, that person or staff must evaluate the whole situation before proceeding to find the solution.

While understanding the whole situation and trying to find out the solution, the customer service provider must keep in mind the following aspects:

- One must understand, that if a customer has raised a particular issue, then the problem would be very serious for him/her.
- The staff should not blame customers for lodging complaints or regarding the issue related to the product.
- One should be calm and patient while handling the situation.
- One should never judge the customers' perspective and try to understand their point of view.
- One should show concern for customers' problem
- One should render apologies for customers' inconvenience and give assurance to solve their problem as soon as possible.
- One should take assistance from the manager/supervisor to find out the best solution
- One should find such solutions which are beneficial both for the business and customers. The solution must not violate the company's policies.
- Make an action plan for handling difficult situations. Involve other team members to get more suggestions and ideas.

Types of customer service problems and solutions

S.NO	Problem	Solution
1.	Unavailability of products	Ask customers to be patient and inform the product manager about the out-of-stock products to ensure placement of order/reorder.
2.	Poor product or service	If a product gets damaged within the guaranteed period, replace it. Also, give some tips to customers about the correct ways of using it for the future.
3.	Slow response time	Improve the connectivity platforms and skilled staff for customer service.
4.	Delay in solving issues	Divide the issue for multiple departments and clearly communicate the steps and procedures to customers.

Table 5.5.1: Types of customer service problem

Customer service recovery process

Step 1: Define the problem

Step 2: Sort out customer issues / Find the solution

Step 3: Process of Internal Escalation / Approval

Customers can only convey their problems through the customer service department of a store. It is the responsibility of a store or the staff to analyse the whole situation of the customer service issue and determine the best possible solution. It retains the customers' trust in the company and keeps them satisfied.

5.5.3 Communicating Solution Options to Customers

Before taking any actions to solve customers' problems, it is necessary to discuss all the possible solution options with the customers. The customer service provider can adopt various mediums to convey the information to customers. For that the customer service provider must find out multiple options and then inform the customer Once the customer decides on a solution option, the customer service provider can proceed to resolve the customer's issue.

Discuss Solution Options with Customers One of the most valuable acts that the employees can give is to give the customers the option to choose from while responding to their challenges. A lot of research suggests that giving someone an option makes things easy for them. Giving just one solution to a challenging situation often makes things difficult for them if they do not understand it accurately. Giving choices to the customers makes them believe that the organisation is on the customer's side.

Benefits of communicating solution options to customers

It's the duty and responsibility of a customer service provider to inform customers about the possible solution to their problems. It has the following benefit:

• Customers get comfortable knowing that their problem has been heard of.

• Customers get multiple options and then they can decide on the most suitable one.

• The service provider can explain the whole situation and options to customers in a proper manner.

• It minimizes any further chances of fault or misunderstanding in the service.

• It gives time to the service provider to take the right action.

Modes of communication with customers

• Direct interaction – It can happen through personal visits, online interactions, etc. Personal visits- Visiting customers personally is the most beneficial one as it leads to a one-to-one interaction with the customers and helps in better understanding them.

• Online interactions- In situations where personal visits are not suitable, online interactions are much better. It helps to interact with large customers.

Ways to communicate solutions to customers

• Use a polite and low voice tone

• Give details of each possible solution available to solve customers' problems.

• Give details about the procedure of problem-solving

• Explain the part of the customer in step-by-step detail step by step to follow the problem-solving procedure.

• Explain to customers the time to be taken to solve a problem.

Empowered Service People Communicate Better

Discuss empowerment and chart of authorities to make decisions to find solutions and communicate with customers-

Empowering a customer service team means enabling every agent to make decisions using their common sense, rather than always having to reply on manager approval. Moreover, when team members are emboldened, they are more likely to be productive and share ideas and solutions with each other. Those are all crucial building blocks for improving teamwork. For instance, employees who are micromanaged and confined to strict workflow mean there is no mutual trust. As a result, agents are afraid to speak up, make mistakes, and fear harsh feedback from their managers.

Use a sample communication email to the customer:

> Hello [Name],
>
> Thanks for contacting us about [paraphrase the customer's inquiry]. I'm glad to provide the [information, details, answers, specifications, etc.] you requested. [Insert the answer to the customer's question here. Include hyperlinks, images, or attachments, if needed.]
>
> [Optional section: Where words are underlined, add hyperlinks]
>
> If you'd like additional information about [topic of inquiry], please look at:
>
> • Our online catalog, where you can search for [topic of inquiry]
> • Our [FAQs], where you can learn more about [topic of inquiry]
> • Our social media channels, including [link to Twitter, Instagram, etc.]
> • Our newsletter, which provides tips and offers related to [topic of inquiry]
>
> To reach me directly, please email me at ChrisSmith@AABBCC.com or call my direct line: 1-800-111-2222. You can also reply to this email or call our customer service team at 1-800-123-4567. All our agents have access to your account information and can help you. We're available Monday through Friday, from 7 a.m. to 9 p.m. CST.
>
> Sincerely,
>
> XYZ, customer service agent

Conclusion

Customer service is a medium that connects a customer to a seller even in the future. It builds a bridge of communication between sellers and customers that gives credibility to customers. It gets broken if customers find that there is no one to support and listen to them in their problems. When a customer finds some issue regarding any service product of any business. It is a seller's duty to retain that trust and identify the cause of customers' issues.

Activity

A boy asked you that while making the payment of his shopping from your store, the store's system got stuck and he made the payment twice for the same item. He asked you to resolve his issue and proceed with his refund as soon as possible.

By following his request you've found a few ways to proceed with his payment, but before taking any action you must confirm with him. What should you do to proceed with the process?

UNIT 5.6: Taking Actions to Resolve Customer Service Problems

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Outline the steps that are taken to resolve the issues
2. Explain the steps of resolving customer service solutions
3. Inform the customers

5.6.1 Introduction

Before taking any step to resolve an issue, one must have a clear understanding of it. It's important to discuss and evaluate a situation and find out the correct solution on its basis. As soon as one finds the most appropriate solution one should take immediate action to resolve customers' concerns.

5.6.2 Tips to Follow before Taking Action

To start with any proceeding to resolve any issue one must keep a few things in mind. They are:

- One should make sure that all the possible solutions have been clearly explained to the customer
- The customer is happy with the solution and intended actions of the service provider.
- The customer service provider should make sure that the particular option is the best solution possible for that situation
- The customer service provider should be aware that the opted solution does not violate the company's policies.

5.6.3 Steps to Resolve Customer Service Solutions

Step 1: Interact with customers-Always interact with customers in a positive manner. Whether talking to them directly or through a communication medium, one must respectfully communicate with customers.

Step 2: Convey the whole situation- When all the possible solutions get decided, the service provider must convey the whole situation to the customer. The customer should know what solution would be best for them and what would not. They must be aware of the time taken for the whole procedure.

Step 3: Decide channels to resolve- Before starting the procedure, the service provider should inform the customer about the whole procedure and the mediums they will follow. The service provider should give them a detailed explanation of the method to use in the whole process.

Step 4: Offer multiple solutions- If the service provider feels that there can be multiple solutions to a problem, then one must offer them to the customer. One must help the customer in deciding the best and the most suitable option for the situation.

Step 5: Follow up at the end with the customer- After completing the procedure, the service provider should follow up with customers about their experience and feedback. One should reconfirm with customers whether their problem has been resolved according to their expectations or not.

For example- When customer representatives do not listen carefully to what the clients need, it becomes very difficult for the customers. To solve it,

- Ensure that you have understood the issue about what the customer requires and double-check the problem if required
- Follow it up with a genuine apology because many customers are simply looking for an acknowledgment of the mistake made by the business
- If you do not have a solution right away, then admit it to the customer right away
- On the other hand, if a ready solution is available, then share it with the customer immediately

When the customer gets transferred from one department to another- this is what we can do to pacify the situation before transferring the customer:

- Inform the customer of the reason, why we need to transfer the call to another agent, senior manager, or department
- Explain the present situation in detail so that the customer understands that sticking with you may take more time to resolve the issue
- Request permission to transfer the call and ask if the customer has any further questions that need answering
- Wait for a confirmation in the affirmative and then initiate the transfer of Internal Approvals if required?

5.6.4 Conclusion

To solve a customer's issue, the customer service provider must follow a pattern. Every action must be systematic and follow channels that suit and comfort the customer in every possible way.

Activity

Imagine a customer has approached you complaining about an employee who is rude to the customer. What are the steps you can take to solve the issue and help in maintaining the relationship with the customer?

Summary

- Establishing organizational image
- Developing basic etiquettes
- Appropriate customer handling
- Ways of building a good rapport with customers
- Sharing correct information with customers
- Importance of maintaining records
- Understanding customer needs
- Improving relationships and communication with customers
- Addressing customer complaints
- Solutions to the customer service problems
- Taking actions to resolve customer service problems

Exercise

1. What is an organizational image? If you want to build the organizational image of your company, what all will you focus on?
2. Make a list of phrases to be used in a conversation and phrases to be avoided in a conversation for maintaining good relationships with customers.
3. Explain how effective customer handling can lead to good turnover of a retail store.
4. How will you identify whether a customer is internal or external?
5. Demonstrate how to develop a positive relationship with an internal customer.
6. If a customer is not able to understand the information passed by you, what other means can you adopt for the same?
7. You have a co-worker, who does not know the importance of creating a database of customers. How will you explain it to them about it?
8. What do you mean by customer need?
9. What are the different types of Customer needs?
10. How can you identify a customer's need for a product?
11. What is the role of feedback in identifying a customer's need for products?
12. Explain how modern technology should be used to gain maximum advantage for building customer relations.
13. List down any three steps that you should do right after listening to the customer's prob-lem.
14. A customer visits your store to buy a product that has run out of stock. The same product is available to buy at other stores around you. What measures would you take to ensure the customer still buys from your store.
15. Mention the importance of identifying customer service issues by a seller.
16. List down any three types of customer service issues?
17. Observe the following body language and list them into desirable and undesirable body language-

    a) Staring on mobile phones while conversing

    b) Staring continuously at a customer's face

    c) Welcoming the customer with a smile

    d) Leaning on the wall while talking

e) Making faces at the customer

f) Touching the customer on the shoulder while conversing

g) Shoulders hunched backward

h) Erect posture

i) Open arms

j) Steady handshake

18. List down the modes of communication with customers.

19. State the benefits of communicating solutions to customers before taking any actions to resolve their concerns.

20. List down the points that you must consider before proceeding with any solution.

Notes

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Scan the QR codes or click on the link to watch the related videos

www.youtube.com/watch?v=IQsbFaNZLm4

How to make sale effective

6. Maintain Health and Safety

Unit 6.1 - Health and Safety at Workplace

Unit 6.2 - Waste Management

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Identify and report accidents and emergencies.
2. Discuss how to protect health and reduce safety risk
3. Follow guidelines for lifting and handling goods
4. Discuss the concept of waste management

UNIT 6.1: Health and Safety at Workplace

Unit Objectives ◎

By the end of this unit, the participants will be able to:

1. Identify and report accidents and emergencies
2. Discuss how to protect health and reduce safety risk
3. Follow guidelines for lifting and handling goods

6.1.1 Identifying and Reporting Accidents and Emergencies

An accident is an event that is unplanned, unintended, unexpected, or unintended exposure to risk. This may either be a risk that has not been identified or a risk that has been identified but not adequately controlled. All businesses should have plans in place for responding to emergencies and crises and keeping people safe.

Employers should have a reporting system in place for all accidents, dangerous occurrences, incidents, and near misses. Accidents can occur like fire, bomb alerts, chemical spillage, and security alerts.

Accidents

In order to avoid accidents, it is always said that one should work in a safe manner to prevent accidents from occurring in the first place. For example, one should wear appropriate protective clothing/ equipment for the task at hand, at all times.

Ensure that adequate information and on-the-job training about the first aid facilities and services are available in the workplace, including:

• Where to find first aid kits.

• Location of first aid rooms.

• Complete and up-to-date contact details of trained first aid officers in the workplace.

• Procedures for critical accidents – such as who should be responsible for calling the ambulance/ doctor/nurse and what is the best method of contact, and measures for the evacuation of the injured person/s.

• Emergency procedures for the elimination of life-threatening chemicals commonly used in the workplace.

• Universal precautions for the control of infection.

• Who to contact for debriefing/psychological support.

Accident Reporting and Investigation Plan

The accident reporting and investigation plan prescribes methods and practices for reporting and investigating accidents that can be read and understood by all managers, supervisors, and employees. Reporting incidents and accidents are required under the Work Health and Safety (WHS) legislation. Workplaces tend to have well-developed reporting procedures in place, which aim to fully understand the accident/incident and prevent any future occurrences through investment in injury prevention, based upon accurate data.

The employees should perform certain duties in the case of occurrence of accidents. The employees must:

• Comply with all organizational policies and procedures.

• Report all work-related dangerous occurrences, near misses, and accidents.

• Co-operate in any accident or incident investigation.

• Take all practical steps to prevent accidents from their occurrence.

Important steps kept in mind in order to get saved from the different types of accidents

Improper maintenance can cause accidents:

1. **Mechanical**
   • Material handling and improper lifting techniques contribute to a lot of injuries. Repetitive movements and environmental conditions can put a lot of strain on the human body over time.
   • Sharp edges in fixtures can cause injuries. Sharp edges can lead to cuts or deep wounds on the body if not handled properly. The wound may lead to bleeding or sometimes cause infection in the body.
   • Injuries are common, and while unfortunate, they can happen when workers least expect them, even when following all safety guidelines and wearing the proper protective equipment. If not dealt with accordingly and swiftly — and that includes taking adequate time to rest and heal — they will become worse over time.
   • Wet floors can cause falls. While cleaning or sometimes when there is a spill of water on the floor can lead to the fall of a person due to its slippery nature. These falls can lead breaking of bones or sometimes even the death of the person. In such situations a caution board / 'cleaning in progress sign' has to be kept on the floor in the form of a plastic fold-out in a bright yellow colour to attract attention so that customers do not step on the wet floor.
   • Improper latches in the trial room can sometimes lead to people getting stuck in the trial rooms and sometimes can lead to shortness of breath and also panic situation is created.
   • Fires or explosions: Risk factors such as defective gas connections, carelessly kept flammable items, or exposed flames regularly cause explosions and fires in the workplace. Damage to the breathing system, various degrees of burns, and even possible deformity are among the ailments sustained. Explosions and flames cause 3% of all workplace injuries and have the highest fatality rate of all likely workplace hazards.

2. **Electrical**
   • Ensure there are no open wires: The workplace must have safety procedures in place to check electrical circuit isolation. Workers should also have adequate knowledge and expertise to be able to isolate, lockout, and test circuits for no voltage potential before starting work.
   • Lighting sockets and LED strips are safely tucked inside beyond the contact of customers
   • Lighting sockets and LED strips are safely tucked inside beyond the contact of customers, in order to avoid accidents that may occur due to carelessness. This may help to avoid mishaps that could be caused by children in their playful mode. Also, precautions must be taken to avoid any kind of hindrance in the working of electrical appliances or circuits.

Accident Reporting Procedures

Employees injured on the job are to report the injury to their supervisor as soon as possible after the incident/accident, and when it is safe to do so. Near-miss accidents or incidents (when an employee nearly has an accident but is able to avoid it) should be reported as well. All accidents and incidents

should be reported for prevention purposes. There should be a form at each workplace that you (or the person involved) and any witnesses can fill out, where possible, otherwise, it can be completed by a health and safety representative (HSR) if necessary. The form should cover the following areas:

• Description of the occurrence – what was the event that occurred, which required this report to be completed?

• Nature of injury or disease – select the most appropriate description from a range of options. What injury or disease happened as a result of the occurrence?

• First aid, medical treatment, or hospital admission – this section asks for a description of what was done to treat the injury or disease.

• Part of the body affected – tick off which part or parts of the body were affected as a result of the occurrence.

• Source of injury – what actually caused the person to be injured or acquire a disease? This could be a piece of machinery or other hazardous materials for example.

• Probable cause or causes of injury – how was the source listed above actually responsible for the injury?

• Investigation – this asks a series of questions that seek to find out why the person has been injured or has acquired a disease.

• Notification checklist – this checklist makes sure that everyone who should have been contacted regarding the matter has been contacted and asks whether appropriate action has been taken by the authorities.

• Preventative action – this asks whether or not any action has been taken to prevent the occurrence from happening again.

• Witness details – this part is to be filled out if someone saw the occurrence happen.

• It is essential if any sort of legal action is to be taken.

The supervisor must immediately notify the Department of Human Resources and the Department of Public Safety when an incident/accident occurs. If they are not available, a report should be forwarded for their review and the supervisor shall conduct an investigation and interview.

Any employee witnessing an accident is to call for emergency assistance when needed. In addition, the employee is to immediately report the accident to his or her supervisor and take part in answering questions related to the Accident Report and Accident Investigation.

Reporting faulty equipment

Any damaged, faulty or malfunctioning equipment should be immediately withdrawn from

use and addressed according to organizational policies and procedures. In general, this may require reporting the damage or fault to management, taking action to ensure other workers are not injured or harmed by the equipment by tagging or labeling it with a hazard sign, and/or removing the equipment from the area.

Incident report forms

An incident report is a method used by workplaces to document the occurrence of anything 'out of the ordinary that has caused a 'near miss or may have the potential to cause harm to a client, member of staff, or visitor. These form a record and allow the organization to keep track of incidents, which occur.

The following standard information is required on incident report forms:

- Names of persons involved
- Date and time of the incident
- Location of the incident
- A complete written description of what happened or could have happened
- Names of any witnesses
- Other information is relevant to that particular organization.

Accident Investigation Procedures

A thorough investigation of all accidents will lead to the identification of accident causes and help:

- Reduce economic losses from injuries and lost productive time.
- Determine why accidents occur, where they happen, and any trends that might be developing.
- Employees develop an awareness of workplace problems and hazards.
- Note areas where training information or methods need to be improved.
- Suggest a focus for safety program development.
- The accident investigation report is used to:
- Track and report injuries on a monthly basis.
- Group injuries by type, cause, body part affected, time of day, and process involved.
- Determine if any trends in injury occurrence exist and graph those trends if possible.
- Identify any equipment, materials, or environmental factors that seem to be commonly involved in injury incidents.
- Discuss the possible solutions to the problems identified with the safety team and superiors.
- Proceed with improvements to reduce the likelihood of future injuries.

Practical first aid tips

Following are some basic first aid procedures for treating shock, bleeding and wounds, burns, choking, electric shock, eye injury, fainting, heat stroke, hypothermia, and unconsciousness. These techniques can be used in the workplace or at home and being prepared will help a lot to deal with such situations.

1. **Shock**

   Shock can be life-threatening. Symptoms include cold sweat, weakness, irregular breathing, chills, pale or bluish lips and fingernails, rapid weak pulse, and nausea.

   - Do not give the victim anything to eat or drink.
   - Lay the victim on his/her back, but do not move him/her if there's a back or neck injury. If the victim is unconscious, vomiting, or has a severe injury to the lower face or jaw, lay him/her on his/her side and be sure the victim is getting adequate air.
   - Keep the victim warm (not hot) by use of blankets or clothes.
   - Raise the victim's feet and legs with a pillow. (Only do this if it does not cause the victim any pain.)
   - Bleeding and Wounds
   - Place a clean cloth or gauze and gloved hand over the wound; apply firm, steady pressure for at least 5 minutes.
   - Elevate an injured arm or leg above the level of the victim's heart if practical.

- When bleeding stops, secure the cloth with a bandage. Do not lift the cloth from the wound to check if the bleeding has stopped. Be sure the bandage is not too tight—it
- May cut off circulation.
- Check the victim for shock.

2. **Burns**
   - Chemical or Compressed Gas Burns
     - Use a drench hose, emergency shower, or eyewash for at least 15 minutes to rinse
     - away all traces of chemicals while removing any contaminated clothing from the victim.
     - Cover the burn loosely with a clean, dry cloth or special burn dressing.
     - Check the victim for shock.
   - Heat or Electrical Burns
     - If necessary, use water to stop the actual burning of the skin.
     - If the skin is not broken, submerge the burned area under cool running water, or
     - gently apply a cool compress until the pain is relieved. Bandage with a clean, dry cloth.
     - Do not break a blister if one forms.
     - Do not apply ointments or creams.
     - If the skin is broken, or if burns are severe:
     - Do not clean the wound or remove embedded clothing.
     - Cover the burn loosely with a clean, dry cloth.
     - Expect shock and treat accordingly.
   - Choking

     If the victim can speak or cough forcibly and is getting sufficient air, do not interfere with his/her attempts to cough the obstruction from the throat. If the victim cannot speak or is not getting sufficient air, have someone call emergency while performing abdominal
   - Thrusts
     - Stand directly behind the victim and wrap your arms around the stomach.
     - Make a fist with one hand and place that fist just above the navel and well below the ribs, with the thumb and forefinger side toward you.
     - Grasp this fist with the other hand and pull it quickly toward you with an inward and slightly upward thrust. Repeat if necessary.
   - Unconsciousness of victim
     - Lay the victim on their back.
     - If the object that is blocking the airway is visible, reach a finger into the victim's mouth (along the inside of the cheek) and try to sweep the obstruction out of the victim's throat, being careful not to push the object deeper into the victim's airway.
     - Even if this is not successful, attempt rescue breathing.
     - If the victim is still not breathing or moving, begin chest compressions (CPR).
   - Electric Shock
     - Do not touch the victim until electrical contact is broken.
     - If possible, unplug or switch off the source of electricity.
     - If the victim is not breathing and has no pulse, call an ambulance or seek medical attention immediately.

- Eye Injury
  - Hold the eyelids apart and flush the eyeball with lukewarm water for at least 15-30 minutes. Be careful not to let runoff water flow into the other eye.
  - Place a gauze pad or cloth over both eyes and secure it with a bandage.
  - Get to an eye specialist or emergency room immediately.
- Cut, Scratch, or Embedded Object
  - Place a gauze pad or cloth over both eyes and secure it with a bandage.
  - Do not try to remove an embedded object.
  - Get to an eye specialist or emergency room immediately.
- Fainting

> Note: Fainting victims regain consciousness almost immediately. If this does not happen, the victim could be in serious danger, and you should call ambulance as soon as possible.

  - Lay the victim down on their back and make sure they have plenty of fresh air.
  - Reassure the victim and apply a cold compress to the forehead.
  - If the victim vomits, roll the victim on his/her side and keep the windpipe clear.
  - Report the fainting incident to the victim's doctor.
- Heat Stroke

Heat stroke can be life-threatening. Symptoms can include a body temperature of 105°F or higher; dry, hot, flushed skin; rapid pulse; unconsciousness; and lack of perspiration.

  - Get the victim out of the heat and into a cooler place.
  - Place the victim in the shock position, lying on the back with feet up.
  - Remove or loosen the victim's clothing.
  - Cool the victim by fanning and applying cloth-wrapped cold packs or wet towels.
  - Treat for shock.
- Hypothermia (Prolonged exposure to the cold)

Hypothermia can be life-threatening. Symptoms include lower than normal body temperature, shivering, apathy, disorientation, drowsiness, and eventually, unconsciousness.

  - Immediately move the victim into the best available nearby shelter.
  - Get the victim out of wet clothes and replace them with dry clothes, a sleeping bag, or blankets.
  - Have the victim drink a warm, sweet, non-alcoholic beverage if possible.
  - Seek medical help.
- Unconsciousness
  - Determine responsiveness by gently tapping the victim's shoulder and asking, "Are you okay?"
  - If there is no response, shout "Help!" and look for a medical alert tag on the victim's neck or wrist.
  - If the victim is not breathing and has no pulse, begin CPR

Emergency Management Procedures

Emergency management procedures should be clearly written in plain language and contain all the necessary information to allow the person in charge on the day to manage a crisis effectively. Procedures should be such that any member of the management team would be able to pick them up and use them to manage the crisis.

Potential emergencies covered should include:

• Winter emergencies- It is wise to keep on-hand items such as flashlights and spare batteries. Drivers should carry with them spare clothing and a mobile phone.

• Power cuts- Managers should ensure that their workplace has adequate ventilation and access to chilled drinkable water for staff. Additional fans or air conditioning may be fitted if hot weather is predicted.

• Heatwaves- During a heatwave, managers, and staff should be alert to the specific symptoms of heat exhaustion and heatstroke, particularly if staff are working outdoors, in hot buildings, or doing heavy manual tasks.

• Fire- Any fire would constitute an emergency situation and provision must be made for the safe, orderly evacuation of the building.

• Floods- Proper evacuation must be provided in case of any emergency related to flood

• Staffing emergencies- Contact numbers for all staff should be available, including landlines and mobiles, especially for those who live close by and would be least affected by travel emergencies. Additional contingency plans would include arrangements with staff supply agencies.

• Major incidents- In the event of a major incident or security emergency in the local area, for instance, a bomb threat or a major security alert or disaster, employers should follow their policies on responding to emergencies. They should be advised by the police and keep alert for official announcements.

• Violent incidents- Where a risk of violent incidents is identified, employers should have suitable contingency plans in place.

Availability of the First Aid Kit in a Retail Store

In case of an accident in a retail store, the victim must receive immediate emergency care. For this reason, every retail establishment should include a first aid kit. The first aid kit should include the following items, keeping in mind the worst-case scenarios. Cotton balls, antiseptic solutions, bandages, gloves, and emergency blankets, among other things, must be present at first. Various medications might also be kept on hand in case of an emergency. The items' expiration dates must be considered.

Training

All staff should receive training on accident reporting procedures and responding to emergencies and crises. New staff should be provided with the information during their induction.

Senior staff should be trained in the techniques and skills to perform accident investigation or analysis. Many different types of training are available for this purpose including root cause analysis training.

Managers and senior team members should be trained in what to do in the event of a crisis. Training programs should aim to enhance knowledge and understanding of the content of the crisis management plan, and the specific roles and responsibilities of staff.

Activity

Demonstrate how will you provide first aid to the following accidents cases-

1. An unconscious person
2. A person suffering from an eye injury
3. A person who got an electric shock

6.1.2 Protecting the Health and Reducing Safety Risk

Hazard

A hazard is something that has the potential to cause injury, disease, or death in a workplace. A slippery floor could result in someone falling and breaking an ankle.

A risk is a potential outcome from a hazard.

There are several aspects to the development of a safe workplace environment:

• The development of policies
• The development of consultative processes
• Hazard identification, assessment, and control.

There are several methods used to identify hazards/risks. These include:

• Safety assessment (engineers/designers)
• Review of accident statistics
• Review of accident reports
• Review of statistics of security breaches
• Review of reports on security breaches
• Informal job hazard analysis
• Regular workplace inspections
• Consulting
• Health surveys
• Inspectors/consultants' reports.
• Implications from hazards/risks can be accessed through:
• Accident/injury reports
• Information on risk from chemicals from data sheets
• Review of accident/injury statistics
• Information from government health and safety agencies
• Who is exposed, how much, and how might they be affected.

Hazards can occur no matter where we work or what we do. However, we can work towards preventing or at least restricting these hazards as much as possible by:

• Eliminating the hazard
• Substitution of the hazard
• Using engineering controls, e.g.: guards, ventilation exhausts
• Changing work practices and training staff

- Using protective clothing and equipment
- Improving security systems.

Effective controls protect workers from workplace hazards; help avoid injuries, illnesses, and incidents; minimize or eliminate safety and health risks, and help employers provide workers with safe and healthful working conditions.

Controlling hazards

To effectively control and prevent hazards, employers should:

- Involve workers, who often have the best understanding of the conditions that create hazards and insights into how they can be controlled.
- Identify and evaluate options for controlling hazards, using a "hierarchy of controls."
- Use a hazard control plan to guide the selection and implementation of controls, and
- implement controls according to the plan.
- Develop plans with measures to protect workers during emergencies and non-routine activities.
- Evaluate the effectiveness of existing controls to determine whether they continue to provide protection, or whether different controls may be more effective. Review new technologies for their potential to be more protective, more reliable, or less costly.
  - Step 1- Identify control options- Collect, organize, and review information with workers to determine what types of hazards may be present and which workers may be exposed or potentially exposed.
  - Step 2 – Select controls- Employers should select the controls that are the most feasible, effective, and permanent. Select controls according to a hierarchy that emphasizes engineering solutions (including elimination or substitution) first, followed by safe work practices, administrative controls, and finally personal protective equipment. Avoid selecting controls that may directly or indirectly introduce new hazards. Examples include exhausting contaminated air into occupied workspaces or using hearing protection that makes it difficult to hear backup alarms.
  - Step 3- Develop and update a hazard control plan- A hazard control plan describes how the selected controls will be implemented. An effective plan will address serious hazards first. Interim controls may be necessary, but the overall goal is to ensure effective long-term control of hazards.
  - Step 4- Select controls to protect workers during non-routine operations and emergencies- Depending on the workplace, these could include fires and explosions; chemical releases; hazardous material spills; unplanned equipment shutdowns; infrequent maintenance activities; natural and weather disasters; workplace violence; terrorist or criminal attacks; disease outbreaks (e.g., pandemic influenza); or medical emergencies. Nonroutine tasks or tasks workers don't normally do, should be approached with particular caution. Prior to initiating such work, review job hazard analyses and job safety analyses with any workers involved and notify others about the nature of the work, work schedule, and any necessary precautions.
  - Step 5- Implement selected controls in the workplace- When resources are limited, implement measures on a "worst first" basis, according to the hazard ranking priorities (risk) established during hazard identification and assessment. Promptly implement any measures that are easy and inexpensive—e.g., general housekeeping, removal of obvious tripping hazards such as electrical cords, basic lighting—regardless of the level of hazard they involve.
  - Step 6- Follow up to confirm that controls are effective-

- Conduct regular inspections (and industrial hygiene monitoring, if indicated) to confirm that engineering controls are operating as designed.
- Evaluate control measures to determine if they are effective or need to be modified. Involve workers in the evaluation of the controls. If controls are not effective, identify, select, and implement further control measures that will provide adequate protection.
- Confirm that work practices, administrative controls, and personal protective equipment use policies are being followed.
- Conduct routine preventive maintenance of equipment, facilities, and controls to help prevent incidents due to equipment failure.

Activity

1. Demonstrate how will you confirm that the office is free of any risky hazards.
2. Visit a retail store and enquire about their preventive measures for a fire accident. Mention some of their innovative technology to prevent any dangerous hazards.

6.1.3. Guidelines for Lifting and Handling Goods

Lifting heavy items is one of the leading causes of injury in the workplace. According to research, bending, followed by twisting and turning, were the more commonly cited movements that caused back injuries. Strains and sprains from lifting loads improperly, or from carrying loads that are either too large or too heavy, are common hazards associated with manually moving materials. When employees use smart-safe lifting practices, they are less likely to suffer from back sprains, muscle pulls, wrist injuries, elbow injuries, spinal injuries, and other injuries caused by lifting heavy objects.

Guidelines for lifting and handling goods

Following principles would help to serve as guidelines for lifting and handling goods-

1. Preparation- Before lifting or carrying, plan out your lift. Think about:
   - How heavy/awkward is the load? Should I use mechanical means (e.g. a hand-truck) or another person to help me with this lift?
   - Where am I going with the load? Is the path clear of obstructions, slippery areas, overhangs, stairs, and other uneven surfaces?
   - Are there adequate handholds on the load? Do I need gloves or other personal protective equipment? Can I place the load in a container with better handholds? Should another person help me with the load?
   - What is the temperature? Be aware of extreme temperatures that can affect lifting and material handling. For example, muscle flexibility decreases in cold temperatures, and hot temperatures can lead to heat stress.
   - Is there adequate lighting? Low visibility or poor lighting increases the chance of trips and falls. Provide proper lighting for areas with low light and try to perform work during daylight hours when possible.
2. Lifting-
   - Get as close to the load as possible.
   - Try to keep the elbows and arms close to the body.

- Keep the back straight during the lift by tightening the stomach muscles, bending at the knees, keeping the load close and cantered in front of you, and looking up and ahead.
- Get a good handhold and do not twist while lifting.
- Do not jerk; use a smooth motion while lifting.
- If the load is too heavy to allow this, find someone to help with the lift.
- Limit the weight you lift to no more than 50 pounds.

3. Carrying-
   - Do not twist or turn the body; instead, move the feet to turn. The hips, shoulders, toes, and knees should stay facing the same direction.
   - Keep the load as close to the body as possible with the elbows close to the sides.
   - If you feel fatigued, set the load down and rest for a few minutes
   - Ramps can be helpful in moving heavy items from one level to another.

4. Settling down-
   - Set the load down in the same way you picked it up, but in the reverse order.
   - Bend at the knees, not the hips.
   - Keep your head up, your stomach muscles tight, and do not twist your body.
   - Keep the load as close to the body as possible.
   - Wait until the load is secure to release your handhold.

Conclusion

Apart from these principles, one can also use personal protective equipment where needed, such as gloves with good grip and steel-toed boots where appropriate, to avoid finger injuries and contact stress. Ensure that gloves fit properly and provide adequate grip. It is always important for proper training of the workers to avoid any risk.

Case study

According to the Bureau of Lavor Statistics, "In 2016…the back accounted for 38.5 percent of all work-related musculoskeletal disorders."

Activity

Demonstrate how will you check for proper lifting of goods. If any accident occurs during the process, how will you provide first aid for a sprain or an injury.

UNIT 6.2: Waste Management

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. State the basic definition of waste management
2. Discuss the concept of industries going green
3. List the different techniques for reducing waste in an economy
4. Explain how to save packing materials
5. List the different types of packing materials

6.2.1 Introduction to the Waste Management

Waste management is termed as a process of managing all wastes that are being created in the sphere. The sphere can be any natural environment, a retail store, a shop, a company's office, etc. Waste management involves all activities which are waste collection, transportation of waste, treatment of waste, disposal of waste, and monitoring of all wastes to generate efficient output levels.

The wastes can be of different natures which can be liquid, solid, and gaseous substances. The wastes can be managed using different techniques which are household reuse, biological treatment, organic treatment of wastes, and radioactive wastes. Waste management has a fundamental aim of reducing the harmful effects posed by waste. Waste management tends to pose positive impacts on human health. The policies of managing waste are different in all countries and capacities.

Fundamental principle of waste management

The wastes can be managed through any medium or method but the three main R's are the basic framework that is generally used for managing all potential wastes. Let's look at these three R's which are provided below:

• Reduce
• Reuse
• Recycle

To minimize the waste, several waste management strategies are used but these strategies mainly focus on these three R's.

• Reduce – The reduce is an act of reducing the extent of wastes generated from the production, consumption, or distribution of economic or non-economic activities. The waste cannot be totally reached the zero level. Each activity creates a few frequencies of waste. For example, if the juice maker produces juice, then the juice manufacturing also creates the waste of fruit pulp which are the remainder after squeezing the total amount of juices from the fruits. Therefore, each firm can exercise the goal of reducing waste whichever is possible. If the waste would be minimized, then fewer harms would be posed by the waste in the environment.

• Reuse – Reuse is termed as an act of using the remains of the product again to prevent increasing wastage. The principle of reuse provides several methods by which the scrapped objects could be used again. For example, a plastic box in which snacks are sold can be used again to store the pulses and grains at home.

- Recycle – The recycle is an activity of converting waste substances into newly formed products and services. For example, the vegetable peels are disposed of and composted into the manure and biogases.

6.2.2 Green Industry and Eco-friendly

The industries have been totally working on the traditional norms, but nowadays the industrial framework is being shifted to environment-friendly methods. Industries want to adopt production methods that do not harm the environment to a larger extent. It can be said that today industries are mainly focusing on sustainable methods of production that could not generate waste anymore. Instead, the sustainable methods of production ensure that the least amounts of wastage could get generated, and the environment could remain safe for future generations.

In the field of retail stores, the service fulfilments executive also tries to bring the methods in production activities that have the least potential of creating harmful substances. The economy grows on the stage of development with the basic motive of preserving the environment.

Reasons for transitioning industry to the green industry

The environment is given by nature so that we can live it to the fullest. In reality, one generation comes after another. If all-natural resources and environmental tools are used by the present generations today, then it will be difficult for future generations to use the environmental resources at their best. Any expiry of natural resources would enable future generations to use these resources in the future.

The improved industrial production is creating larger levels of pollution in the country which further is harming the country. The countries cannot afford to stop industrial production as it is important for economic growth. Therefore, it is important for the industry to adopt eco-friendly methods of production, consumption, and distribution.

Ways to bring greenery and eco-friendly aspects to industries

The following are the different ways to boost greenery and eco-friendlier aspects in industries:

- Offering remote work – If the employees travel on a daily basis, then the fuel gets
- combusted and the pollution is generated. Therefore, if the employees will be provided remote work, then there will be the least combustion of fuels.
- Providing public transit commuter benefits – If the employees bring their personal vehicles for commuting from their homes to the office location, then there will be more vehicles moving in the environment which would further create pollution. Therefore, the employees should be provided commuter benefits, so that the employees can come to the office in sharing vehicles.
- Usage of sustainable products – The employees are provided the facilities that increase their comfort zones in the work areas. Also, raw materials are used in the production areas. Therefore, only sustainable products should be used only.
- Usage of second-hand products – The recycled furniture can be used in the offices for facilitating employees' comfort and production.
- Adoption of three R's – The industries should bring the usage of the three R's that are reduce, reuse and recycle in production.
- Compost – The industries should try to compost the green wastes in the gardens and parks.

- Sustainable packaging – The packaging should be done with the usage of the least and most sustainable materials. The packaging should be done with paper so that the least plastic can be used in packaging.
- Usage of energy-efficient upgrades – The energy-efficient appliances should only be used in production areas.

6.2.3 Common Practices Adopted in Retail Stores with the Aspect of Eco-friendliness

There are certain practices that are adopted in the retail store with the dimension of eco-friendly aspect:

- Usage of paper bags – The retail store does not give plastic bags for putting customers' purchased goods. Instead, the retail store provides paper bags because the plastic bags are not recycled appropriately. Instead, the usage of plastic bags inhibits the pollution in the environment when they are disposed of.
- Online bills – When customers make payments in against their purchases, then the invoices are issued to them. The invoices are issued in paper forms. The retail store provides online bills where the papers are not used for making bills.
- Digital payment – If the payments are made digitally, then there will be less requirement for cash in the market. Digital payments save paper and trees in the environment.
- Advise people to bring cloth bags – The retail store advises the customers to bring cloth bags so that there would be less need of giving paper bags and plastic bags.
- Usage of BPA-free plastics –BPA-free plastics are the type of plastics made up of chemicals. These types of plastics are recycled easily. Therefore, these plastics emit less pollution into the environment.

6.2.4 Saving on Packing Materials

No store can sell products without packaging. Even the packaging involves the larger amount of plastic use that becomes the main reason for emitting larger pollution in an environment. The retail store cannot get rid of the packaging as the packaging is required for protecting products as well as attracting customers. But if the retail store adopts sustainable methods of packing products and saves the packing materials, then they can become capable to reduce the generation of waste in an environment.

The following practices can contribute to saving packing materials:

- Cut the size of primary packaging – The primary packaging is the immediate packaging in which the products are put and stored. No retail store can devoid the usage of primary packaging and the customers could not be asked to arrange the bags for the primary packaging of products. The retail store mandatorily has to give the means of primary packaging. Therefore, the size of primary packaging should be reduced.
- Change the count – The products are packed in multiple layers. The majority of the layers are put for attracting customers. Therefore, the count of packing layers should be reduced in order to save the packing materials.
- Alter the size of the shipping case – The shipping cases are made in such a manner in which a single package covers the larger space. Therefore, the shipping cases should be manufactured effectively so that only packing materials will not only be saved. Instead, the Retail Order Fulfilment Assistant can deliver a larger amount of packages in one go.

- Usage of qualitative corrugated boxes – The corrugated boxes are made up of cardboard. These boxes are used in protecting the products' movement from the warehouse to the customers' place. Therefore, corrugated boxes of better quality should be used so that these boxes can be reused again and again without creating much wastage.

6.2.5 Different Packing Materials for Retail and E-commerce

Whether the store operates online through e-commerce or offline, it is important for the store to pick the packing materials appropriate so that the packaging cost and waste could be minimized.

The different packing materials are provided below:
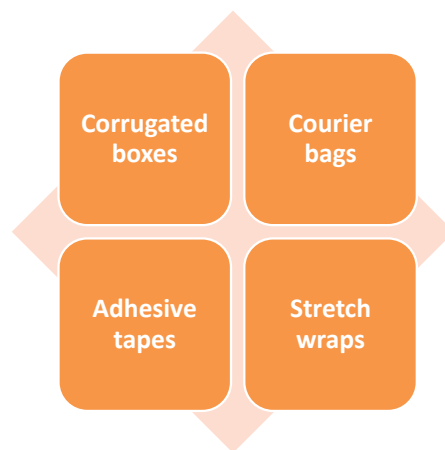
Fig. 6.2.1: packing materials

- Corrugated boxes – These boxes are made up of cardboard and are generally used as secondary packaging material. These boxes are generally in rectangular form. These boxes ensure the protection of products. These boxes are eco-friendly and do not provide much pollution to the environment.
- Courier bags – Courier bags are generally used in shipment. These bags are tamper-proof and do not protect the products from dirt and water. These bags carry the products worth in larger volumes.
- Adhesive tapes – The adhesive tapes are used for giving strict packaging to the products. These tapes are used in the e-commerce industry.
- Stretch wraps – The stretch wraps are made up for packing two or more products in a single packaging. These wraps ensure the safety of the products from dust and dirt.

Among all packaging materials, the tapes are made up of plastic materials. Therefore, the stores should reduce the use of plastic materials in packing the products so that the waste could be minimized with effectiveness and efficiency.

Summary

- Identify and report accidents and emergencies
- Protecting health and minimising safety risks
- Guidelines for lifting and handling goods
- Definition of waste management
- Concept of how industries are going green
- Techniques for reducing waste
- Different types of packing materials

Exercise

1. What is the importance of developing procedures for accident cases?
2. What are the different types of emergencies? How can you help a person suffering from heat waves?
3. What are the different types of methods to identify hazards or risks?
4. How can you as an employee contribution in preventing hazards at your workplace?
5. What is the importance of maintaining guidelines for lifting and handling goods?

Notes

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Scan the QR codes or click on the link to watch the related videos

www.youtube.com/watch?v=rt6QXdKafRQ&t=46s

how to greet customers

7. Working in a Team

Unit 7.1 - Team Dynamics in Retail

Unit 7.2 - Working Effectively in an Organization

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Discuss the role of a Team in Retail sector
2. Explain the responsibilities of an employee towards the team
3. Elaborate in detail about the working of a retail store
4. Describe the Job Responsibilities of Team leaders
5. Demonstrate problem solving skills
6. Evaluating the Progress of Organisational Coordination and Health and Safety Arrangements

UNIT 7.1: Team Dynamics in Retail

Unit Objectives ⊚

By the end of this unit, the participants will be able to:

1. Describe the role of a retail team
2. Describe the Team leaders' role to support the teamwork
3. Describe employees' responsibilities towards the team
4. Develop effective work habits

7.1.1 Introduction

In a retail environment, individual seller of business entities interacts and cooperates with their team members. As a professional, seller must handle variety of tasks and responsibilities, some of them require the sellers to work by own and many of them require assistance of two or more people to work together. In order to successfully complete a task, seller needs the team to work efficiently.

Team: Team is group of people with complementary skills dependant on each other to accomplish a common goal. Each team member has the equal and joint accountability for the goal accomplishment. The teamwork helps each team member to refine his/her own skills and teach to work in contribution.

In a retail environment, each team-member has a clear objective, defined timeframe and is accountable for results. As a team member, an individual has the following job responsibilities: -

1. Maintain good relationships with your team members
2. Offer support and guidance when needed
3. Help determine who does what and when
4. Communicate any issues or concerns to the appropriate people
5. Play a part in developing a productive and cohesive team

- **Maintain Good Relationship with team Members:** We probably have heard about the importance of building good relationships in the workplace. However, it may not be apparent what exactly a working relationship entails, or how to build one. Learning more about working relationships can help to collaborate better with a team and create a positive workplace atmosphere.

Building strong work relationships is one of the most important aspects of anybody's job. There are multiple reasons for this:

- **Effective teamwork:** Good relationships involve respect, communication, and honesty, which can all be beneficial when working as a team.
- **Improved morale in the workplace:** People with good working relationships tend to handle conflict effectively and treat each other with mutual respect and goodwill. In a work environment that promotes this kind of culture, employees typically are happier.
- **Increased productivity and work satisfaction:** When people get along in the workspace and work effectively as team members, they are more productive. Improved productivity, in turn, leads to increased job satisfaction and motivation.

7.1.2 Ways of Building Strong Relationships with Team Members

We can build and maintain strong relationships with team members through the following ways-

- Communicate often: One of the most important aspects of relationship building is effective communication, which involves just as much listening as it does talking. This means that we should actively listen when a co-worker or manager approaches you and consider their point of view before responding.

- Be consistent and trustworthy: Building the trust of the colleagues and team members involves consistently acting in a trustworthy, transparent and supportive way.

- Avoid gossip: If one team member has an issue with a fellow worker, they should first try to have a polite and honest conversation with that person. If this does not yield a positive result, one can call a meeting with a superior and the colleague in question, and address the issue in a transparent and professional manner.

- Support team members: One of the best ways to forge good relationships with fellow workers is to support them. If one is in a senior position, for instance, try to mentor and educate junior staff as best one can. Always be complimentary towards the co-workers and focus on their achievements as opposed to their failures.

- Remain positive in interactions: When faced with deadlines or a stressful time at work, staying positive can help keep the team members motivated. Instead of expressing worry, we can encourage ourselves and co-workers by offering positive insight and inspiration to continue working.

- Deliver quality work on time: If we want to build positive relationships, one of the best ways to do so is to produce quality work on time. This demonstrates not only that we are professional and good at what we do but also that we respect our co-workers and consider them when we perform our daily duties.

- Supporting and guiding team members : Supporting and guiding team members provides the opportunity for exploring the current situation and the options for improving it. It provides the opportunity for enhancing overall performance, of individuals and of the organization. Each team member's strengths would balance in support for others' weaknesses. After working in the industry or organization for a while, team member are likely to find themselves in the position of supporting and guiding others in job skills. To do so an individual needs to have:

  o The skills or experience to perform the job.
  o The ability to coach, teach or train others in that job.
  o The team member may ask the leader, mentor or coach who is on a work placement. In these cases, you will need to coach the person in the specific procedures with which they are unfamiliar, e.g. procedures relating to:
  o Modes of communication
  o Contact with clients/customers
  o Job descriptions and responsibilities
  o Interaction with other team members
  o Interaction with supervision and management
  o Health and safety

In some cases, team members identify a need for improvement in a job/task that a person has been doing for a while, timely feedback on such occasions is very important. It is important that job coaching is carried out in a sensitive, constructive and helpful manner. If an individual doesn't have a good working relationship with a colleague, then for the productivity and output of the team they have to develop an understanding. On-the-job coaching is an extremely good way of raising productivity, efficiency and morale within an organization.

7.1.3 Coaching Session

While explaining the overall purpose of coaching, it is important that the team member develops a nonthreatening and positive relationship with trainee. In this introductory part of the coaching session, you will:

• Describe the task

• Highlight the knowledge and skills the trainee has in relation to the task

• Outline what they are going to learn and do

• Encourage them to be positive about the coaching session

• Demonstrate how the skills that they will learn are relevant to their job.

When supporting and guiding, it is important that you check that the trainee understands at each point along the training process. This is important because if they do not understand one step in the task, they are likely to get the following steps wrong or apply them incorrectly. Their understanding can be checked by:

• Asking them to demonstrate a task

• Asking them to explain a task

• A combination of both of these.

Behaviour such as looking confused, frustrated, worried, standing back, getting angry or being aggressive, may all be indications that the trainee has not understood what you have demonstrated. Be alert to these signals and do not jump to conclusions about how well the trainee has understood your coaching. When answering trainee's questions, there are a number of techniques that you can use including:

• Providing information

• Expressing your own opinion backed up with evidence or examples

• Explaining that you do not know the answer, but would be happy to research it and provide them with an answer later

• Referring them to another co-worker or another source of information, such as a manual or procedure document.

Help Determine Who Does What and When - It is important to know whether the team members have understood their role and their responsibilities. For this a detailed report of the work about who does what and why should be clearly mentioned to avoid any confusion. Thus, the team leader should take the ownership of clearly delegating the work to their team members.

Communicate any issues or concerns to the appropriate people If the team members face any issues with regard to work, they should immediately report it to the team leader as the relevant authority. For example-   If there is a process confusion, the team members should involve a senior member of the team or a team leader to clear the doubts. It becomes important in such situations that team members do take uninformed decisions on their own and instead reach out to seniors for help.

7.1.4 Play a Part in Developing a Productive and Cohesive Team

Team cohesion is the key to the efficiency of almost every successful business. Team cohesion occurs when a group of individuals feels connected and driven to achieve a common goal. A large part of team cohesion is maintaining unity throughout a project and being able to feel that one has actually contributed to the group's success. Group members don't just respect one another. They also trust each other to contribute equally, support each other, and work with the whole team in mind. While cohesive teams are often made up of people with diverse talents from different backgrounds, what ties them all together is a strong sense of identity drawn from the organization itself. They share values, goals, and processes.

Team cohesion can be built by the following ways-

• Leader: The role of a leader to provide direction to the team, vision to the team, motivation to the team, team building skills and create ground rules for working with each other.

• Creative Director role: Creative director supports a team to maintain progressive energy for everyone involved that is vital for team work achievements. In case, something does not work for a team, the creative director shifts the focus on another approach.

• Facilitator: In many organizations, the facilitator does not have a formal authority; the facilitator helps the team to make the decision. Even if a leader is acting as a facilitator, then the leader is asking the team or supporting the team to take those steps. When teams brainstorm together and discuss plans, ideas, a facilitator has to be on hand to clearly and precisely log everything.

• Coach: The coach in a team provides one-to-one support after training. Suppose a team member has been trained with something, the coach supports that member after the training. Under the one-to-one training, if there are any issue team faces, here the coach is the first person to go to. These rules overlap sometimes. A coach might be the same person as the team leaders.

• Member: The last role of an effective team member needs to participate in team meetings and do whatever assigned to them. Members participate in meetings or via webinar platform to brainstorming, idea generations or any other support they need to provide.

7.1.5 Role of Team Leader and Team Members

The Role of a Team Leader: The role of a leader is to provide direction, vision, and motiva-tion to the team. They also set expectations of how the team should perform and function together while setting the ground rules of team operations. Team leaders take responsibility of proper communication within the team, reporting and other functions of the team. The main goal of a team leader is to ensure that the team performs to the desired and expected levels collectively.

Start off by setting a team goal, clarify the goal and eliminate confusion within the team, and finally provide the direction. The team leader is also responsible for assigning individual roles & group member roles to team members.

The Roles of Team Members: A team normally in retail consists of Team leader who could be a Floor Manager or a Department Manager, and Members could be those performing the roles of sales and service fulfilment. Each and every member have their own responsibilities. They play their role for the welfare of the team. Some of the roles and responsibilities of team members are briefly described below.

7.1.6 Dress Codes and Job Levels

The dress codes are defined as the standards in which the retail store present the Retail Order Fulfilment Assistants. The dress codes do not only tell what to wear, instead these bring uniformity in the presentation of human resources of Retail Order Fulfilment Assistants. The dress codes are generally considered as the formal and casual in which the Retail Order Fulfilment Assistants are expected to wear the formal dress on the certain days and casual dresses on the certain days.

The customers do not generally consider the dress codes of Retail Order Fulfilment Assistant, but the dress codes give the good impression of Retail Order Fulfilment Assistants to the customers. The professionalism of Retail Order Fulfilment Assistant is majorly depicted by the dress that he/she wears.

The dress codes are important because:

• It brings uniformity in the employees and the customers can easily recognize the Retail Order Fulfilment Assistants.

• The customers feel secure and assisted when they come across the Retail Order Fulfilment Assistants. When they see the people of same clothing style, then they receive the continuous assistance.

• The dress codes can be of the products which the retail store sells. The dress codes can be described as the marketing avenue to target the focus customers.

Each retail store contains the several employees in which the hierarchy of reporting relationships are maintained. Each person is given the certain level of authority and responsibility that is contained by an employee whenever he/she works in an organization. A retail store can have various people like sweepers, Retail Order Fulfilment Assistants, operations manager and staff, accounts team, taxation team, etc. There should be the defined reporting relationships among all Retail Order Fulfilment Assistant so that each person can know who has to report to whom. This deteriorates the chance of confusion that can arise among the people employing in the retail store.

7.1.7 Developing Effective Work Habits

Every retail store aims to hire a perfect employee and carry the business with an ideal team of perfect employees. An experienced employee understands his/her job-responsibility but a fresher needs time and training to develop effective work habits. Some of effective work habits are as follows: -

• Problem-Solving and Decision- Making Skills: The skill of critical thinking helps an individual in analyse the situation and take beneficial decision. In a retail environment, situations such as customer handling, cashpoint problems, out-of-stock etc helps the staff to solve the problem and builds roadmap for future to avoid such scenarios. It enables staff to correct issues before they become major problems.

• Strong Organizational Work Habits: Physical workspace is just one part of being organized. It helps the employee to tidy workspace with physical tools so that he/she can keep things sorted and easy to find.

• Ability to Focus: In a retail environment, every team and its staff members have their specific job-roles, but some of the staff members or their acts could be disturbing and potentially distract others. Employees can improve their focus by making changes to their workspace. If noise is an issue, consider using a white noise machine or using headphones to listen to music that helps you focus. Short breaks also help to be focused on the task because sitting for too long or working on a single project, can make it difficult to stay attentive.

- Punctuality and time-management: An employee needs to develop the sincerity and punctuality towards the work he/she is responsible to perform. Individual can develop the by start scheduling and time-management. An individual with strong time-management skills is able to get to work right away, and get more done in less time.

- Initiative and Follow-Through.

Employee needs to develop the ability to take initiatives and follow-up It helps him to build a good coordination with other team members. Initiatives and follow-ups make an employee an invaluable part of the team.

- Attentive to Detail and Accuracy: Every Retail environment needs the work to be done quickly and on time. An employee undertakes the sector's requirement and develops the habit of detail and accuracy.

- Being a Team Player: A team is a group or number individuals who are working together to accomplish a task. An ideal team is one, in which every member, irrespective of their position, works in co-ordination with the other team members.

Conclusion

The success of retails sector relies on its team member's work efficiency. An ideal team is a group of eligible and responsible individuals. Team leader assists the employees to be co-ordinated and supportive to each other. If a team member is lacking somewhere, prompt guidance and help is required to assist him develop the qualities that meet the requirement of that retail environment.

Activity

Describe the important communication skills that you would use when supporting and guiding a colleague

UNIT 7.2: Working Effectively in an Organization

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Describe the role of team leader and team member in a retail store
2. Demonstrate the Problem-Solving Skills
3. Evaluating the Progress of Organisational Coordination and Health and Safety Arrangements

7.2.1 Introduction

In the retail sector, sellers sell finished goods directly to the public, either through brick-and-mortar storefronts or online. Traditional retail stores have the staff of two or more employees. All the staff members work as a team to serve customers, facilitate transactions, and keep the retail store in order. In the retail sector, effective teamwork is crucial to manage and managers who understand the importance of teamwork can direct their team members more effectively.

7.2.2 Working in an Organisation

The wide range of retail work such as selling, packing, billing etc execute much more efficiently when the team members of a retail store work together and in coordination. Teamwork is not always something that happens on its own. Retail managers understand the value of team building hence exercise it to strengthen relationships within the team. Success of a retail store depends upon the ability to foster a team atmosphere. Yet Retail Order Fulfilment Assistants face significant challenges in developing teams and teamwork in their workplace, such as high staff turnover, hectic and stressful nature of a retail environment. A strong manager can set a tone that teamwork is important by using effective communication.

7.2.3 Components of a Retail Sales and Service Team

• Sales associates- A Sales Associate, or Retail Sales Associate, is responsible for assisting customers throughout the buying process. Their duties include greeting customers when they enter the store, helping customers find specific products or showing them how to use them and ringing up customer purchases on the POS register.

• Their other responsibilities include-

  o Deliver excellent customer service that ensures ongoing sales and high levels of customer satisfaction

  o Work with customers to determine their needs and then recommend the right product to solve the customer's problem

  o Assist in ensuring that the product presentation area is clean and organized

  o Develop and cultivate strong buying relationships with customers

  o Use company literature and available training resources to stay up to date on product features

• Service personnel- Service personnel are those people who provide an organization's services for customers. Service personnel are important in all organizations. However, they are particularly important in those situations where, in the absence of clues from tangible products, the customer will form an impression of the organization from the behaviour and attitudes of its staff. These

people may perform a 'production' or 'operational' role but may also have a customer contact role in service organizations.

- Merchandisers- A merchandiser ensures that the correct amount of products are on hand in a store or on a website. They make sure the products arrive on time, and work closely with the purchasing department (and buyers) in order to forecast, plan, and monitor stock levels.
- Merchandisers also work closely with display staff in order to decide how goods should be seen so as to maximize sales. In smaller companies, the same individual may be responsible for both the merchandising and the buying.
- Retail Order Fulfilment Assistants- Retail Order Fulfilment Assistant responsibilities include receiving payments and issuing receipts, gift-wrapping packages and keeping track of all cash and credit transactions.

The responsibilities include

- Manage transactions with customers using cash registers
- Scan goods and ensure pricing is accurate
- Collect payments whether in cash or credit
- Issue receipts, refunds, change or tickets
- Redeem stamps and coupons
- Cross-sell products and introduce new ones
- Resolve customer complaints, guide them and provide relevant information
- Greet customers when entering or leaving the store
- Support staff- It means the people who work for an organization to keep it running and to support the people who are involved in the organization's main business. They are a valuable part of the entire working culture.

Managers who work in a team to serve customers efficiently- Managers are responsible for the processes of getting activities completed efficiently with and through other people and setting and achieving the firm's goals through the execution of four basic management functions: planning, organizing, leading, and controlling. Both sets of processes utilize human, financial, and material resources.

7.2.4 Supporting the Team Work Effectively

- In a retail store, a team leader carries many responsibilities; these may vary slightly depending on the type of Retail Order Fulfilment Assistant employing him, but certain elements are consistent across retail stores, catalogue order Retail Order Fulfilment Assistants and online Retail Order Fulfilment Assistants. The key role of a team leader is to support and motivate the team members to work in order. An ideal team leader adapts the following acts to support his/her team to work: -
- Instruction and Training: A team leader provides instructions and training of the work environment to new and existing team members. Instruction and training of a retail team member includes the help on sales, customer dealing, answers to frequent questions voiced by customers or advice on how to handle problem clients.
- Motivate, Praise, Criticize and Reward: An ideal team leader motivates the employees to perform their job role effectively and consistently encourages them to work better. Praise a worker who does a stellar job; use his sale or sign-up as a case study to motivate other associates. An ideal team leader avoids criticizing the team members and reward an outstanding performer.

- Lead by Example: In a retail environment, situations often occur that demand the intervention of a supervisor or leader above the sales-associate level. In such a case, the team leader handle the situation by leading the circumstances and set example for team members to handle the situation peacefully.

- Communication: In a retail store team leader, has a role of liaison between your team and your supervisor or upper management. He/she needs to complete his/her own daily work while maintaining an open ear for the retail team. When the team members come with complaints such as safety concerns, inadequate compensation or a hostile work environment, present the situation in-front of the top management or the person in a higher position

7.2.5 Employees' Responsibilities Towards the Team

In a retail environment, team members also have responsibilities to work in order order. The coordination of retail workers towards their job-role helps the store to satisfy the customers' need in well manner. An individual employee's responsibilities towards the team are as follows:

- Stock management: A retail worker who stocks shelves ensure that products are available for customers to buy. The role of this team member is to check shelves and replenish supplies of any products that are running low. He/she also has the responsibility to check dates on product labels and remove any products that have passed their sell-by date.

- Maintain the record of Merchandising: In a retail environment, every team member has the job-responsibility to keep the record of his/her work. This ACTIVITY helps the team to work in coordination and reduces the risk of contingencies. Recording and maintaining the merchandising helps the store in maximizing the sales.

- Customer Assistance: The key responsibility of a retail team is customer assistance and provide the prompt solution of their queries such as assisting a customer in purchase decisions. The more complex the product or its description needs the more customer assistance. Team member being in their job-role have the responsibility serve the product in easy-to-understand manner. Customer assistance also is important in self-service stores, such as food supermarkets or electrical Retail Order Fulfilment Assistants, where retail workers help customers to locate products or explain product features.

- Customer Checkout Assistance: Retail staff who work at the checkout accept payment from customers. Retail Order Fulfilment Assistant at cashpoint uses cashpoint devices to execute a sales transaction and receive the payment. Staff at the cashpoint help customers in packing the products they bought.

7.2.6 Demonstrating Problem-Solving Skills

Just like a routine for your home life, it is also a good business practice to be organized at work and to keep a clean and safe workplace for your staff and clients/customers. In a retail setting, there are many areas in a workplace that need to be considered when keeping it clean, tidy and safe:

- Point-of-sale terminals and surrounding areas
- Counters, bench tops and working surfaces
- Walkways/aisles
- Displays
- Fittings and fixtures
- Sinks

- Preparation areas
- Storage and receiving areas
- Fitting rooms.

Keeping these areas clean and well organized will show people that your workplace is professional. If the store is cluttered and untidy it can be harder for customers to find what they are looking for and they could leave the store in frustration, resulting in loss of sales. Keeping your store clean will assist in giving the customer a positive and pleasant shopping experience. Imagine if you were a customer and entered a store that had dead flies in the window displays, empty boxes on the floor and cluttered benches. What would your opinion of this store be? Before starting demonstration, be assure that your work area is clean and tidy. For good impression on customer always clean your work area and keep all the equipment's, products, broachers, pamphlets, advertisements and informational items near or in handy position, so that they are readily available when you have to show the details and provide information to the customer.

7.2.7 Evaluating the Progress of Organisational Coordination and Health and Safety Arrangements

Security systems and procedures are in place to prevent the loss of stock and money and to protect staff in the event of a robbery and of course the profits for the workplace. They describe how the store controls the risks and gives staff instructions on what to do. Naturally security systems will differ from store to store. This could be due to the size of the store, what products are sold there, cost of the systems and possibly, the location of the store. For example: A large jewellery store may have surveillance cameras and security whereas a bookstore in a smaller town may opt for an alarm. There are many factors that need to be taken into account about the store security such as:

- Store size/shape, is very important for security of product being protected
- Stock levels
- Potential risk or loss
- Budget constraints.

It is important that for a seller to understand that the security systems are in the workplace needs to be work correctly. Security procedures are usually detailed in the store's policy and procedures manual and will indicate how employees are to handle a situation as well as the person to report to in a given situation. You will need to know how your store's security systems work, who the responsible staff members are and ensure that other staff are following these procedures. When dealing with security risks: This section looks at policy and procedures for keeping cash secure, including those relating to:

- Point-of-sale transactions, for payments by cash, EFTPOS and cheque
- Transporting cash
- Armed robbery

Robbery - A robbery can occur under a variety of circumstances. It may be that the opportunity presents itself. The appeal of stealing money from an unattended and open cash drawer could tempt someone who had not planned on stealing. There can also be the type of thief who plans the robbery with great detail and hits the store when they know there is a quieter time and/or when it will have maximum cash in the store. Some thieves will try and get the point-of-sale operator confused, so as to receive back more change than they are entitled to.

7.2.8 Deal with Accidents and Emergencies - Follow Company Policies and Procedures

What are policies and procedures? Policies and procedures are a set of documents that outline the rules that are to be adhered to in the workplace. Policies and procedures assist an organization in achieving its mission statement and are written with the organizational culture in mind. They include details on how to perform certain duties, operate machinery, how to fill in forms that is used in your workplace. They must be easy to read and in sequential order when describing how to perform a duty. Some workplaces may refer to it as a Work Instructions Manual. Having a Policy and Procedures manual can alleviate the '6 W's':

- What?
- With what?
- Where?
- When?
- Why?
- Who?

A policy and procedure manual may include instructions regarding the following:

- Code of conduct
- Mobile phone policy
- Smoking or no smoking
- Drugs and alcohol
- Job descriptions and your responsibilities
- Discipline and termination
- Inductions
- Health and safety
- Security and surveillance
- Reporting procedures
- Issue resolution procedures
- Administration
- Operation and maintenance of equipment
- Workplace ethics
- Sales/financial transactions
- Cash and stock handling
- Documentation

On the bottom of each form there should be the date they were written, review dates and version numbers. This ensures that they are current and looked at on review dates to ensure the policy is still relevant and that there haven't been any changes. Policies and procedure manuals need to be made easily accessible to all staff. Benefits of having a policies and procedures manual Well written policies and procedures manuals:

- Are consistent with the values of the organization and comply with legal requirements
- Demonstrate that the business is operating in an efficient manner
- Ensure that consistency is kept through decision making and operational procedures

- Can give strength to staff if a legal issue arises
- Save time when unsure how to perform a procedure by consulting with the manual
- Clarify functions and responsibilities.

7.2.9 Report Accident and Emergencies Promptly to Right Person

Your responsibility requires you to be aware of potential hazards and correct reporting processes. If you notice a potentially hazardous situation, e.g.: a client expressing violent behaviour, it is important that you report it immediately to management and fill out the appropriate forms as legally required of you. If you are injured at work, you must:

- Report the injury to management as soon as possible, and certainly within 24hours
- Seek proper treatment for your injury Accidents

Always work in a safe manner to prevent accidents from occurring in the first place. For example, you should wear appropriate protective clothing/equipment for the task at hand, at all times. Make sure that you have been given adequate information and on-the-job training about the first aid facilities and services available in your workplace, including:

- Where to find first aid kits
- Location of first aid rooms
- Complete, up-to-date contact details of trained first aid officers in the workplace procedures for critical accidents – such as who should be responsible for calling
- The ambulance/doctor/nurse and what is the best method of contact, measures for evacuation of the injured person/s
- Emergency procedure for the elimination of life-threatening chemicals commonly used in the workplace
- Universal precautions for the control of infection
- Who to contact for debriefing/psychological support?

7.2.10 Constituents of Forms for Reporting Accidents and Incidents

Reporting of incidents and accidents is required under the Work Health and Safety (WHS) legislation. Workplaces tend to have well developed reporting procedures in place, which aim to fully understand the accident/incident and prevent any future occurrences through investment in injury prevention, based upon accurate data. Reporting and recording should also facilitate costing and associated financial loss. Always report an accident to management immediately. There should be a form at each workplace that you (or the person involved) and any witnesses can fill out, where possible, otherwise it can be completed by a health and safety representative (HSR) if necessary. The form should cover the following areas:

- Description of the occurrence: What was the event that occurred, which required this report to be completed?
- Nature of injury or disease: Select the most appropriate description from a range of options. What injury or disease happened as a result of the occurrence?

- First aid, medical treatment or hospital admission: This section asks for a description of what was done to treat the injury or disease.
- Part of the body affected: Tick off which part or parts of the body were affected as a result of the occurrence.
- Source of injury: What actually caused the person to be injured or acquire a disease? This could be a piece of machinery or other hazardous materials for example.
- Probable cause or causes of injury: How was the source listed above actually responsible for the injury?
- Investigation: This asks a series of questions that seek to find out why the person has been injured or has acquired a disease.
- Notification checklist: This checklist makes sure that everyone who should have been contacted regarding the matter has been contacted and asks whether appropriate action has been taken by the authorities
- Preventative action: This asks whether or not any action has been taken to prevent the occurrence from happening again. Witness details – this part is to be filled out if someone saw the occurrence happen. It is essential if any sort of legal action is to be taken. Reporting faulty equipment Any damaged, faulty or malfunctioning equipment should be immediately withdrawn from use and addressed according to organizational policies and procedures. In general, this may require you to report the damage or fault to management, take action to ensure that you or other workers are not injuredor harmed by the equipment by tagging or labelling it with a hazard sign, and/or removing the equipment from the area. Incident report forms An incident report is the method used by workplaces to document the occurrence of anything 'out of the ordinary' that has caused a 'near miss' or may have the potential to cause harm to a client, member of staff or visitor. These forms record and allow the organization to keep track of incidents, which occur. The following standard information is required on incident report forms:
  o Names of persons involved
  o Date and time of the incident
  o Location of the incident
  o A complete written description of what happened or could have happened
  o Names of any witnesses

Other information relevant to that particular organization.

Practical first aid tips Following are some basic first aid procedures for treating shock, bleeding and wounds, burns, choking, electric shock, eye injury, fainting, heat stroke, hypothermia, and unconsciousness. These techniques can be used in the workplace or at home and being prepared will help make the most of a serious situation.

7.2.11 Team Meetings

Team Meetings: Working in a team is not always the easiest thing to do. Teams work on a common goal yet from different angles, objectives, and geographic locations. It is, therefore, important to have team meetings so that the team can have an overall view of the progress. Whether at work place, in business or at school, people working in a team should have time to have a conversation with each other. The meetings are effective in speeding up results of the work to be done and enhancing efficiency.

Objectives of Team Meetings:

- **To achieve common goals set:** Every team has a common goal to be achieved and before achieving, a proper planning is done for the tasks to be completed. Thus team meetings helps in achieving the set target and putting a strategy forward.

- **Reviews (Course Corrections, Improvements, etc.):** While performing a task or carrying out a job effectively, team meetings help in bringing up suggestions and smoothen the reviewing process. Moreover, team members can guide, facilitate and enhance the work together.

- **Provides a Safe Environment for Sharing:** Team meetings give members a safe environment to share information and findings. When sharing such information, the team opens up doors for more research, cooperation and productivity.

- **Gives Space for Receiving Feedback:** Having a team meeting gives team members a breathing space to get their heads out of work. It provides an opportunity for colleagues to refocus and reflect on their progress. All members have a chance to deliver in-depth reports on their progress and receive reports from their colleagues too.

- **Daily Team Meetings for sales and service improvements:** Daily team meetings play an important role in providing the team with updates on work progress and solving anyqueries if the team members have. It also gives an opportunity to the team leader to motivate the team members which eventually impacts the overall, sales and service performance.

- **Follow up Team Meetings:** A follow up meeting could involve discussions on ongoing projects and could also be lined up to discuss matters or subjects that require attention more than once. It gives the team an opportunity to relook on the decisions made, steps taken and also enables them to figure out progressive future steps. Right after the meeting, the meeting organizer follows up by sending out meeting notes and collecting feedback. If the meeting resulted in action items or other plans, the leader may also schedule a dedicated follow-up meeting to check progress.

Summary

- Role of a retail team
- Ways of building strong relationships with team members
- Developing a productive and cohesive team
- Role of team Leader and team members
- Dress codes and job levels
- Developing effective work habits
- Components of a retail sales and service team
- Health and safety arrangements
- Dealing with accidents and emergencies
- Objectives of team meetings

Exercise

1. Explain the responsibility of team leader in retail sector?
2. In a retail environment why is team work important, explain?
3. You have a team of ten experienced Retail Order Fulfilment Assistants, yet you observe that the team is unable to give the benchmark performance, what measures will you take to address the situation?
4. Demonstrate the problem-solving skill in retail sector?
5. What do you mean by health and security measure?
6. What is the role of a team in measuring the health and security measure in retail sector?

Notes

8. Employability Skills

DGT/VSQ/N0102

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https://www.skillindiadigital.gov.in/content/list

9. Annexure

Module No.	Unit No.	Topic Name	Page No	Link for QR Code (s)	QR code (s)
1. Introduction	UNIT 1.1: Introduction and Ice Breaker	1.1.1 Introduction	14	www.youtube.com/watch?v=FXHD4VPWKrk	Be a successful sales person
	UNIT 1.5: Career Progression of Retail Order Fulfilment Assistant	1.5.1 Career Progression	14	www.youtube.com/watch?v=Gm-agMsfu0s&t=40s	English phrases for sales person
	UNIT 1.4: Significance of Backend Operations in Retail with Respect to Receiving, Storing, Processing and Delivering Goods/orders	1.4.1 Role of Backend Operations in Retail Sector	14	https://www.youtube.com/watch?v=xOkRogadXqk	Types of Retail Formats
2. Receiving and Storing Goods	UNIT 2.1: Planning and Preparation Before Receiving Goods	2.1.1 Stock Control System	44	www.bakercommunications.com/sales-training-videos.Htm	Sales training video
		2.1.1 Stock Control System	44	https://www.youtube.com/watch?v=jxCG9MxIoK0&t=44s	Stock management(FIFO/LIFO)

Module No.	Unit No.	Topic Name	Page No	Link for QR Code (s)	QR code (s)
		2.1.1 Stock Control System	44	https://www.youtube.com/watch?v=r7FoV4XoAaw	Maintain stock in the retail store RFID
	UNIT 2.2: Receiving, Recording and Reporting Goods	2.2.1 Rituals Followed Out in Receiving Goods	44	https://www.youtube.com/watch?v=7Ls47gOpNOA	Rotation of stock
		2.2.1 Rituals Followed Out in Receiving Goods	44	https://www.youtube.com/watch?v=ehcjne9-Lto	POS machine use
5. Creating a Positive and Lasting Impression of Self and the Organization in the Customers' Minds	UNIT 5.1: Sharing Correct Information with Customers and Staying up to Date with Product Information	Establishing Organizational Image	141	www.youtube.com/watch?v=IQsbFaNZLm4	How to make sale effective
6. Maintain Health and Safety	UNIT 6.1: Health and Safety at Workplace	6.1.1 Identifying and Reporting Accidents and Emergencies	160	www.youtube.com/watch?v=rt6QXdKafRQ&t=46s	how to greet customers

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