



**RASCI**  
Retailers Association's  
Skill Council of India

# Participant Handbook

Sector  
**Retail**

Sub-Sector  
**Retail Operations**

Occupation  
**Store Operations**

Reference ID: **RAS/Q0103, Version 4.0**  
**NSQF level 3**



## Retail Sales Assistant

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Prime Minister of India

“ Skilling is building a better India.  
If we have to move India towards  
development then Skill Development  
should be our mission. ”



## Certificate

### COMPLIANCE TO QUALIFICATION PACK – NATIONAL OCCUPATIONAL STANDARDS

is hereby issued by the

**RETAILERS ASSOCIATION'S SKILL COUNCIL OF INDIA**

for

**SKILLING CONTENT: PARTICIPANT HANDBOOK**

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The preparation of this handbook would not have been possible without the retail industry's support. Industry feedback has been extremely beneficial since inception to conclusion, and it is with the industry's guidance that we have tried to bridge the existing skill gaps in the industry. This participant handbook is dedicated to the aspiring youth, who desire to achieve special skills that will be a lifelong asset for their future endeavours.

## About this book

This participant handbook has been designed to enable training for the specific Qualification Pack (QP). Each National Occupational Standard (NOS) has been covered across units. The key learning objectives for the specific NOS mark the beginning of the units for that NOS. The symbols used in this book have been described below.

A Retail Sales Assistante is responsible for optimizing inventory to ensure maximum availability of stocks and minimizing losses; adhering to standard operating procedures, processes, and policies at the store while providing timely and accurate reporting; managing sales and service delivery to increase store profitability; executing visual merchandising displays as per standards and guidelines; ensuring overall safety, security and hygiene of the store; implementing promotions and special events at the store; leading and managing the team for developing store capability, and conducting price benchmarking and market study of competition. The individual should be meticulous, motivated to learn new things, logical, and result-oriented. He or she must have manual dexterity, right eye for visual quality, and excellent attention to detail. Among others, the individual must have decent communication skills and be able to prioritise tasks. The trainee will enhance his/her knowledge under the trainer's guidance in the following skills:

- **Knowledge and Understanding:** Adequate operational knowledge and understanding to perform the required task
- **Performance Criteria:** Achieve the required skills via hands-on training and complete the necessary operations within the specified standards
- **Professional Skills:** Ability to make operational decisions related to the area of work

The handbook incorporates the well-defined responsibilities of a Retail Sales Assistant.

## Symbols Used



Key Learning Outcomes



Unit Objectives



Exercise



Tips



Notes



Activity



Summary



Practical

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# 1. Introduction to Retail



Unit 1.1 - Introduction to Retail

Unit 1.2 - Traditional and Modern Retail in India

Unit 1.3 - Retail Formats

Unit 1.4 - Modern Retailing and You

Unit 1.5 - Retail Supply Chain



**Additional  
Reading**

## Key Learning Outcomes

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

1. State the meaning of retail
2. Identify the difference between the traditional and modern retail sector
3. Identify the traditional forms of retailing in India
4. Identify the features of retail formats
5. Identify the departments and functions in a modern retailing operation
6. Identify the components involved in the retail supply chain

## UNIT 1.1: Introduction to Retail

### Unit Objectives

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

1. State the meaning of retail
2. List the features and components of retail
3. Identify the stages in the growth of the retail sector
4. Discuss the reasons for the growth of retail in India
5. Differentiate between the traditional and modern retail sector

### 2.1.1 Retail

**Retail:** Originates from the French word 'Retailleur' which means 'to cut, divide into pieces and sell in small quantities to customers'. In other words, retail is the sale of goods or commodities in small quantities to customers.

**Retailing:** Retailing is the activity that enables products, merchandise or services to reach the customers or end consumer.

**Retailer:** A retailer is a person or an outlet through which products or services are sold to customers or end consumers.

#### Features of retailing

The factors of retailing are:

- Selling directly to customers or consumers
- Selling in smaller units/quantities
- Location advantages: closer/convenient to consumers
- A range of products or services in one place: convenient to customers
- Differences in service levels: customer experiences
- Regular promotions: to attract customers (for example 20% off on MRP)
- Large number of outlets: more stores

#### Key components of a retail store

The key components of a typical retail store are:

- Products and services
- Retail store and store staff
- Customers or consumers

The retail store and staff are the last stage in the 'market' where consumers or customers buy the products or services that they need.

## Activity

1. **Objective of the activity:** To help learners understand how barter system works
2. **Learning outcome:** Learners will be able to understand barter system
3. **Procedure:** Divide the class into three or four groups depending on the size of the class. Give each group a card with one of the following items written on it:
  - Group 1: Rice: 50 kg
  - Group 2: Vegetables: 20 kg
  - Group 3: Salt and masala: 1 kg
  - Group 4: Vessels: 10
4. **Suggested time for the activity:** 10 minutes  
Once the task is completed, share the feedback and discuss what you did, why and how.
5. **Suggested time for discussion:** 5 minutes
6. **Debrief:** Explain the importance of barter system as the very first way of the 'buying' system. Explain that money evolved to make buying more flexible and the subsequent growth of retail
7. **Suggested time for debrief:** 5 minutes

### 1.1.2 Growth of Retail Sector

**Barter system:** Barter system is a system in which goods or services are directly exchanged for other goods and/or services without a common unit of exchange (without the use of money).

**Traditional:** Selling goods and services in smaller stores.

**Modern retail stores:** Supermarkets, hypermarkets, malls, etc.

Reasons for the growth of retail in India

- Rising income levels: More money to spend
- Rising expectations of the young segment of the population: More demand for new and different products
- Nuclear family structure: Not a joint family structure
- Growing literacy: Understand the market better
- The rapidly expanding middle class: Spending power will be more
- Growing urbanisation: The social process whereby cities grow and societies become more urban (more stores to satisfy the needs of the customers)
- Increasing media penetration: Get more information about products and services
- Exposure to international brands and products: Increased demands and explain the traditional retail scene in India. Highlight the highest and lowest organised retail percentages

#### Organised v/s Unorganised

- Unorganised retail 92% per cent market share
- 12 million unorganized (mom-and-pop) stores



### Traditional and modern retail sector

- **Technology:** Technology plays a vital role in modern retail in the following areas: billing software, customer relationship management and indent software - which is used to place orders for products through mails and equipment (used to prevent losses). But the traditional retail sector does not implement any technology for its growth or improvement
- **Systems:** Modern retail follows proper procedures for handling customer complaints, product return policy and ordering procedure. Modern retail companies have their own Standard Operating Procedures (SOPs) to ensure that the day-to-day operations are taken care of, but the traditional retailers do not have any specific procedures/systems to handle their stores on a day-to-day basis. It is a totally biased, or one sided decision. This may cause dissatisfaction among their customers
- **Size and reach:** Modern retail stores are in different formats, depending on the size of the store, size of the department and shopping convenience of the customers. They reach customers in different areas and cater to different segments. Since traditional retail forms do not have the above features, their size and reach are very limited
- **Service levels:** Modern retail stores are in different formats and each format service levels are different and higher than the traditional retailers. For example in a lifestyle stores, the service levels are really high, the SOAs will understand the needs of the customers and will help them to select the right products and also do a consultative selling. The services are offered from entry till exit of the store. But, in traditional retail forms the service levels are not par with the modern retail forms; this is due to different reasons like, size, untrained staff, etc.
- **Scope of products:** Since modern retail has different formats, it offers products in various range/ collection, price, size and quantity. It also caters to customers of different levels. On the other hand, traditional forms of retail offer a very limited range of products. The customers do not have much selection of products
- **Markets:** Unlike the traditional retail sector, modern retail exists in all segments of market like urban, rural, semi-urban areas, catering to a wide range of customers

### Summary

- Meaning of retail
- Features and components of retail
- Stages in the growth of the retail sector
- Reasons for the growth of retail in india
- Difference between the traditional and modern retail sector

## UNIT 1.2: Traditional and Modern Retail in India

### Unit Objectives

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

1. Describe the traditional retail scene in India
2. Describe the emerging modern forms of retailing in India

### 1.2.1 Traditional forms of Retailing in India

- **Kirana/mom and pop stores:** Small shops, selling to consumers in the immediate neighbourhood. They have low cost of operations, flexible selling prices, and limited product range and offer high service levels to their customers
- **Weekly bazaars/markets:** Small temporary stalls selling to customers (small traders) as well as consumers from large areas around the bazaar with low cost of operations and usually lower prices. Specialist traders have a variety of products but in small quantities and low levels of service
- **Whole sale markets/mandis:** Permanent but small stalls. They undertake wholesale and retail activity, essentially food and grain centres, mainly selling to small traders, have low cost of operations and offer lower selling prices (prices fluctuate with demand and supply of vegetables, etc.) with low levels of service
- **Hawkers:** Movable shops with small push carts or vehicles, mainly selling to consumers in a specific locality. They offer low cost of operations, focus on convenience to consumers and usually charge higher selling prices. Store-needs hawkers carry products for regular consumption and offer high levels of service

#### The emerging retail scene in India

Malls, hypermarkets and supermarkets are getting more importance in the Indian retail scenario.

#### Malls

- A huge retail building that houses many stores
- A one-stop shop for all customer needs
- Many products and services: groceries, apparel, jewelry, books, restaurant, cinemas
- For example Alsa Mall (Delhi), The Forum (Bangalore)
- High quality of shopping environment and shared services
- Parking, walkways
- A dream shopping destination

#### Non-store retailing

- There are other ways of selling which may not need a store
- E-Retail: Marketing and selling directly to customer over the internet
- Tele-marketing: Showing products on TV and taking orders over the phone, mobile or internet
- Catalogue marketing: Sending catalogues (books with details of products) to customers and taking orders over the phone or posted orders

- Direct selling: Visiting customers at home and demonstrating products or services followed by direct order taking

## Summary

- The traditional retail scene in India
- The emerging modern retail sector in India

## UNIT 1.3: Retail Formats

### Unit Objectives

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

1. List the different retail formats
2. Summaries the key features of retail formats

### 1.3.1 Retail Format

Retail format is the overall appearance and feel that it presents to customers, primarily its look and layout, the sort of range it stocks and the approach taken to pricing.

Parameter	Format	
Size	Mini (500-1500 sq ft)	Super/Hyper market (2000 - 200,000+ sq ft)
Location	Standalone	Malls
Range	Specialty (narrow range)	Departmental (wide range)
Brands	Exclusive (one company/brand)	Multi brands (different brands/ companies)
Product type	Staples (everyday products)	Life style/Luxury (special occasion/specific)
Price	Value/Discount	Premium

*Table 1.3.1: Retail format*

#### Types of retail formats

##### Standalone stores

- Small to mid size stores: 500 to 2000 sq ft.
- Generally, merchandise one company's (branded) items
- Consist of different sections within the store for related products
- Located within the planned shopping mall or on a high street
- For example Pantaloons, Nike, Puma, Reebok, Levis, Zodiac, etc.

##### Department stores

- Large stores: 20,000 to 50,000 sq ft.
- Cater to a variety of customer needs
- Further classified into departments such as clothing, toys, home needs, etc.
- Multi-brand range
- Premium priced
- May be located in shopping malls or on a high street
- For example Shoppers Stop, West Side

**Discount stores**

- Mid to large size : 2,000 to 10,000 sq ft.
- Sell in bulk, reaching economies of scale or excess stock left over at the season to offer discounts
- The product category can range across a variety of goods : food, grocery, apparel
- Always on discount
- For example Mega Mart, Brand Factory, Factory outlets

**Speciality stores**

- Can range from small to very large: 500 to 100,000+ sq ft.
- Specialise in a very specific range of merchandise and related items
- Build expertise and customer base within this range
- For example Croma, Crossword, Apple Store, Health & Glow

**Convenience stores**

- Relatively small stores (400-2,000 sq ft)
- Located near residential areas – proximity to consumer
- Stocks a limited range of high-turnover convenience products
- Prices are slightly higher due to the convenience factor
- Generally sells Fast Moving Consumer Goods (FMCG) and perishable products
- For example Reliance Fresh
- This is traditionally the strong hold of local Kiranas

**Supermarkets**

- Large size: 2000 to 20,000 + sq ft.
- Self-service stores that offer a wide variety of grocery, processed food, perishables, dairy products, meat and bakery products, non food products and household merchandise
- Organised into departments
- For example Food world, More

**Premium store/Lifestyle stores**

- Mid to large size : 1000 to 20,000+ sq ft
- Span a wide range of products, entertainment and luxury/ leisure categories
- Merchandises are offered at premium prices
- Operation cost is higher than other formats
- Level of customer service is high
- For example Lifestyle, Central

**Hypermarkets**

- Superstores which may combine a supermarket and a department store (covers 150,000 sq ft to 2,50,000 sq ft)
- Very large retail facility having an enormous range of products under one roof, including full lines of groceries, apparel and general merchandise

- One stop weekly/monthly shopping destination for customers
- Focus on high-volume and low-margin sales because of their large footfalls
- For example Big Bazaar, Wal-Mart, Reliance Mart

#### **Malls**

- Largest form of organised retailing today (6,00,000 sq ft to 10,00,000 sq ft)
- Located mainly in metro cities in proximity to urban outskirts
- Lend an ideal shopping experience with a combination of product, service and entertainment
- Stores, restaurants, cinemas, kids play areas
- Essentially provide a platform for many retailers/stores to tap into a common consumer base
- For example Prestige Mall, Forum Mall, Garuda Mall

## **Summary**



- Retail formats
- Features of important retail formats

## UNIT 1.4: Modern Retailing and You

### Unit Objectives

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

1. List the departments and functions in a modern retailing operation
2. Outline the structure of and roles in a front end store operation

### 1.4.1 Departments in Modern Retailing

Handling the day to day working of a store effectively and efficiently is called 'Store operations'. A store's main responsibility is to sell the products and provide good service to its customers. This has to be done in a manner to satisfy customers' needs.

A store is managed by a Store Manager with the support of his/her team members: Assistant Managers, Department Managers, Supervisors, Head Cahiers, store HR personnel, store V.M. personnel, store logistic personnel, store operations assistants(SOAs), security personnel and housekeeping personnel.

To run a store successfully, co-operation and support of the following departments is also required: merchandising, warehouse, finance, projects, human resources and marketing. The cricket team activity from the previous slide can be referred to explain this. Each member of a cricket team is dependent on each other; in the same manner, the store staff members are dependent on other departments to run the business successfully.

Each department has its own roles and responsibilities and importance, at the same time being dependent on one another.

1. **Merchandising:** The roles and responsibilities of the merchandising department are
  - Planning and deciding the products to buy and sell
  - Sourcing products and supplying to the store
  - Deciding on store displays
  - Negotiating with vendors for the best price
  - Placing new products in the store
  - Fulfilling the store's requirements in terms of products
2. **Warehousing:** The roles and responsibilities of the warehousing department are
  - Receiving the stocks from vendors
  - Storing the received stocks and dispatching the stocks to stores
  - Receiving damaged expired, old stocks from the stores
  - Fulfilling the store's requirements in terms of supplying products
3. **Finance:** The roles and responsibilities of the finance department are
  - Planning budgets
  - Processing the invoices and taking care of payments of the vendors
  - Assisting the store staff in terms of handling day to day commercial operations
  - Managing commercial operations

4. **Projects:** The roles and responsibilities of the project department are
  - Identifying store locations
  - Designing store layouts
  - Setting up the store
5. **Marketing:** The roles and responsibilities of the marketing department are
  - Building the brand
  - Advertising and promoting merchandise and services
  - Planning and designing different types of promotions
6. **Human resources:** The roles and responsibilities of the human resource department are
  - Hiring eligible and suitable candidates for different departments
  - Conducting different types of training and development programmes for the present employees and conducting inductions for newly joined employees
  - Processing pay-roll
  - Managing the manpower of the company

In a retail business it is very important that all the above mentioned departments work closely, and achieving the required goal is not possible without proper coordination and cooperation. As in a cricket team, the different departments of retail are important for the working of the team together.

**Note:** An example for the above explanation could be: the coordination between merchandising department and the warehouse. Stores cannot sell without the right products. The merchandising department plays a vital role in this by selecting the right product at the right time. Similarly, warehouse plays an important role in dispatching the required/ordered products to the store at the right time.

#### Structure and roles in a store

- **The Store Manager** is the head of the store and is overall responsible for the day to day operations of the store. The Store Manager reports to the Area Manager/Regional Manager
- **The Store Operations Manager** is the next in charge like an Assistant Manager, who takes care of the store operations. The Store Operations Manager reports to the Store Manager
- **The Department Manager** takes care of a particular department and is responsible for all the activities in that department. The Department Manager reports to the Store Operations Manager
- **The Supervisor** supervises a particular department/section and is responsible for the day to day activities of that department/section. The Supervisor reports to the Department Manager
- **The Store Operations Assistant (SOA)** works for a particular section and is responsible for the day to day maintenance of the same. The SOA takes care of stacking the products, executing the planogram, housekeeping of the section, attending to customers' needs, selling, etc. The SOA reports to the Supervisor
- **The Store Logistic Manager** takes care of receiving products from warehouse and dispatching products from store to warehouse. Other responsibilities are product code updating at the store level, disposal of damages, back room management, etc. The store Logistic Manager reports to the Store Manager
- **The Store Logistic Assistant or Store Operations Assistant** helps in receiving products from the warehouse, takes care of back room arrangement, damage disposal and handles the day to day operations of the store logistics department. The Store operations Assistant reports to the Store Logistic Manager / supervisor. The store operations assistant is also responsible for filling the shelves, maintaining required and adequate stocks at the store



- **The Head Cashier** takes care of the store's commercial activities and prepares and checks all commercial reports and is responsible for the overall commercial activities of the store. The Head Cashier reports to the Store Manager
- **The Cashier** is responsible for billing and managing the cash counter effectively. The Cashier reports to the Head Cashier
- **The Store HR/Administration Manager** takes care of store hiring, pay roll processing and the day to day HR and administration activities. The store HR/Administration Manager reports to the Store Manager
- **The Store HR/Administration Executive** takes care of the day to day HR/administrative functions of the store viz., maintaining attendance, leave, salary, etc. The store HR/Administration Executive reports to the Store HR/Administration Manager
- **The Store Visual Merchandising Manager** takes care of the overall Visual Merchandising activities of the store - planogram implementation, festive and other seasonal displays, etc. The Store Visual Merchandising Manager reports to the Store Manager
- **The Store Visual Merchandising Associate** takes care of the day to day display activities of the store's Visual Merchandising - arrangement of displays, printing promotional talkers, maintenance of signage, banners, etc. The Store Visual Merchandising Associate reports to the Store Visual Merchandising Manager
- **The Store Security Officer** is responsible for the overall security of the store and takes care of issues related to pilferage, etc. The Store Security Officer reports to the Store Manager
- **The Store Security Personnel** takes care of receiving products from the warehouse, opening and closing the store and checking product movement and staff movement, etc. The Store Security Personnel reports to the Store Security Officer

The SOA's primary role is to support the day to day store operations in the area of receiving, moving and storage of goods.

## Summary

- Departments and functions in a modern retailing operation
- Structure of and roles in a front end store operation

## UNIT 1.5: Retail Supply Chain

### Unit Objectives

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

1. State the meaning of supply and retail supply chain
2. Identify the elements of a typical supply chain
3. List the features of a supply chain
4. Identify the factors that influence supply chain management

### 1.5.1 Meaning and Importance

**Supply**—The quantity of something (products and services) that is available in the market.

A retail supply chain is:

- The method by which the goods reach the customers
- The entire set of organisations/people that produces and delivers products and services to the final customer

#### A typical retail supply chain

A typical retail supply chain has four important components. Each component makes the chain complete, and without it, the chain will not function properly. Let us get an idea of the components of a supply chain.

The customer creates a demand for products and services, which prompts the manufacturers to produce them.

The four important components of a supply chain are:

- **Manufacturers:** The role of manufacturers in a retail supply chain is to produce goods. They could also be contract manufacturers who supply products to the core brand manufacturer, like the franchise bottlers for Coca-Cola, etc. They need to ensure timely production, availability of products and efficient distribution
- **Distributors:** These people store the products in large quantities to serve the needs of retailers in their region. From the warehouse or distribution centre, the products go to the relevant market destinations, which could be any one of the several locations or channels that the company sells through. In India, distributors are the back bone of the retail industry
- **Retailers:** The caretakers of the shopping environment. The retailer receives the products, stores them and displays the same for sale. They receive the customers into their stores and serve their needs. Retailers are the bridge between the manufacturers/brands and the customers. They build a strong relationship with the manufacturers and suppliers of products. Retailers are the voice of the manufacturers in the market and also the voice of the customers
- **Customers:** The products stored and displayed in the retail stores are bought and used by the customers

### Features of a supply chain

Features of a supply chain are:

- **Many components, all very important:** As discussed earlier, each component plays a very important role in the supply chain, and the process of manufacturing and supplying goods to the customers will not be complete in the absence of any of these components
- **Many products, one supply chain:** There can be several categories that a company may be producing and many variants of the product in each of those categories. So, the supply chain has to find a way to manage all the products according to each of its variants. For example Nike shoes in a store have many different styles, sizes and colours to choose from. Each of the shoes on display is a unique product. In addition, there are other apparel products that Nike makes

In retail, each variant of a product is a Stock Keeping Unit or an SKU, based on which the supply chain works, when it has to cater to multiple categories (food, non food, apparels, etc.), products and variants.

- **Cross-functional co-ordination:** The components of a supply chain are inter-dependent or mutually supportive-to be successful, a supply chain requires a lot of support and co-ordination from different departments. There should be very close co-ordination between functions

**Example:** A manufacturer of dairy products will need a wholesaler who has the infrastructure to store the products at the right temperature. If the wholesaler does not have the right infrastructure or does not store the products as per instructions, the customers may not be happy with the quality of the products.

Similarly, the operations team is responsible for the performance at the store level and they are the custodians/caretakers of the customer's requests and demands. If they do not indent for and stock the right products required by the customers, the customers will not be satisfied.

### Supply chain management

Supply chain management can be defined as:

- Making products and services available to customers in response to their needs—conveniently and efficiently
- Management of the entire set of organisations/people that produces and delivers products and services to the final customer

## Activity

1. **Objective of the activity:** To enable learners to identify the various the factors that influence the retail supply chain
  2. **Learning outcome:** Learners will be able to identify the various the factors that influence the retail supply chain
  3. **Procedure:** Divide the class into two groups and ask them to list the various factors that influence the retail supply chain
  4. **Debrief:** Explain the influencing factors of the retail supply chain
- Collect feedback.

## 1.5.2 Factors that Influence Retail Supply Chain

Technology based systems have raised the level of effectiveness.

The retail supply chain is not a standalone function and requires the help of different functions. Since a lot of functions are involved, it is difficult to manage without the help of technology in multi-product, multi-location and multi-situation stores. So, technology plays a vital role in the retail supply chain. The three most important functions that are involved in the retail supply chain are:

1. **Transportation:** Transportation of goods is a physical activity. It is one of the links of supply chain that executes the whole supply process. Transportation means packing products, loading and sending them off on their journey towards the customer. The enormous development in the field of automobile technology has helped to reach goods and services from one department to the other effectively and efficiently

Points to be reiterated:

- Physical activity
  - Executes the whole supply process
  - Packing products, loading them and sending them off on their journey towards the customer
2. **Logistics:** The process of planning, implementing, and controlling an efficient cost effective flow and storage of raw materials, in-process inventory, finished goods and related information from the point of origin to the point of consumption for the purpose of meeting the requirements of the customer
    - Logistics planning involves the operations related to co-ordination of all the components of a supply chain, for example figuring out how many trucks need to be added to the unit for effective distribution in the city
    - Today, thanks to the development of technology, there are very well developed M.I.S (Management Information Systems), and with large networks like S.A.P (Systems Applications Products) and E.R.P (Enterprise Resource Planning), it has now become possible to plan and co-ordinate the activities involved in the retail supply chain effectively

3. **Modes of communication:** As in any other business operation, communication plays a vital role in the execution of a retail supply chain

Modern modes of communication like the telephone, the cell phone, the fax machines and the internet/email have brought about a tremendous change in the functioning of a supply chain. They have helped the supply chain to function smoothly and effectively by making it possible to pass on the information to the concerned department/person quickly and accurately.

### The last vital link—you

The store staff members are the last link in the retail supply chain—they interact with the customers and help them find the right product and get value for their money. After all, the very purpose of executing the retail supply chain is to achieve customer satisfaction.

The store staff is the last vital link in the retail supply chain. Their functions include:

- Arranging the products
- Replenishing and replacing the products according to the planogram for easy access to customers
- Guiding customers through the store

## Summary

- Meaning of supply and retail supply chain
- Elements of a typical supply chain
- Features of a supply chain
- Factors that influence supply chain management

## Exercise

Answer the following questions by choosing the correct option:

1. \_\_\_\_\_ is the activity that enables products, merchandise or services to reach the customers or end consumer.
 

a. Buying	b. Selling
c. Retailing	d. None of the above
  
2. \_\_\_\_\_ is a system in which goods or services are directly exchanged for other goods and/or services without a common unit of exchange.
 

a. Barter system	b. Modern retailing system
c. Traditional retailing system	d. None of the above
  
3. Small shops, selling to consumers in the immediate neighborhood.
 

a. Weekly bazaars/ markets	b. Kirana/ mom and pop stores
c. Hawkers	d. None of the above
  
4. Visiting customers at home and demonstrating products or services followed by direct order taking.
 

a. Direct selling	b. Up selling
c. Down selling	d. Indirect selling
  
5. What is the full form of SOA?
 

a. Store Operations Assistant	b. Store Outlet Assistant
c. Store Operations Accompany	d. None of the above

Answer the following:

1. What are the types of retail formats?
2. What are the roles and responsibilities of each department?
3. What do you understand by retail supply chain?
4. What are the factors that influence retail supply chain?
5. What are the functions of a store staff?







## 2. Setting up Product Displays



Unit 2.1 - Displaying Products on the Shelf

Unit 2.2 - Labelling the product displays



## Key Learning Outcomes



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

1. Explain the role of product displays in promoting sales
2. Identify the need for checking potential health and safety issues before setting up and dismantling displays
3. List the legal requirements for labelling products in a display
4. Demonstrate the process of setting up, labeling, and dismantling the product displays at the retail store

## UNIT 2.1: Displaying Products on the Shelf

### Unit Objectives

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

1. State the role of a trainee associate in arranging the deliveries of merchandise for display
2. Discuss the significance of horizontal and vertical selling
3. Describe the elements of sizing
4. Identify the importance of facing
5. Identify the importance of leveling down and bringing front
6. Identify the importance of hang sell

### 2.1.1 Role of a Trainee Associate in Arranging the Deliveries of Merchandise for Display

The support of the associate is very important while preparing the display. While assisting in arranging the display, they get an opportunity to work and learn certain nuances of their job.

The role of the Trainee Associate can help a lot in preparation:

- Get to know the date on which the display is to be done and prepare for the delivery receiving dates as per schedules and process
- Any change of display should be done in what is called the 'silent hours' when no customer is inside the store
- The supervisor, with the help of the store Visual Merchandiser (VM) will communicate the concept and how it is to be executed
- Having understood the design and concept, list the requirements:
  - Shelves
  - Side angles
  - Data strip
  - Back drop
  - Podium material
  - Products that would be displayed
  - Signage
  - Shelf edge label
  - FAB (Feature Advantage and Benefit) card for all except food
  - Props if it a seasonal promotion
- Plan where to put the stocks kept on the fixtures that are getting dismantled from the previous display
- Have a dust bin ready where the waste can be collected while putting up the display and also while removing them. This will help in keeping the place clean and tidy
- Get required pallets or basket trolleys in which you can place the waste and move to the designated place

- Take out the required stock from reserve for displaying. Evaluate if that would be enough
- Take part in the briefing that would be done by the supervisor before executing the display
- Ask questions if any doubt. Do not proceed
- Inform the supervisor if you will be running short of merchandise
- Ensure that the display is in proximity of the products in the aisles and bays where the balance of the same product is available
- Ensure that beverages are not displayed close to soaps and detergents or stationery close to Consumer Durables and Information Technology (CDIT) products
- Escalate your query to your supervisor or VM; even the buyer can be of help to sort it
- Keep a list of articles that are displayed and track them everyday in the display lest it should be lost
- In case any product that has been displayed is missing alert the security and the supervisor
- Keep track of stock and sale of the products on display
- Monitor them so that one would be able to evaluate the effect of display
- Never ever do something which you are not sure about—it will be a waste of time and energy
- Go through the signage and check for:
  - Correctness of details
  - Spelling errors
  - Uniformity of fonts
  - Alignment of text and other details in the label
- Once completed, call the supervisor/VM:
  - Run them through what you have done
  - Get their concurrence of the executed work
  - Sign off the display and start maintaining it
- Once the plan is perfect and the instruction is clear, plan for the fixtures
- Retain the fixtures that are required from the available display
- List the required balance fixtures and reorganise them
- Have the right tools to dismantle and assemble the fixtures
- Draw a rough sketch of the display and mark the fixtures, props and mannequins
- Get the products from the reserve stock or from the racks
- Clean them with dry cloth and ensure that they are not damaged
- All stocks should be fresh and from the latest batch
- Group the products according to their family, category and sub category
- If there is a possibility of accessorising it, do it for add on sales
- Get a sign off on the display and start maintaining it

### Horizontal v/s vertical selling



Fig. 2.1.1: Horizontal display



Fig. 2.1.2: Vertical display

#### Horizontal display:

- Similar products are placed next to each other to form a horizontal pattern
- This type of display is done when the movement of stock is high, volume of stock is high and the space provided is also large
- Horizontal display is usually done for the same SKU

#### Vertical display:

- In a vertical display the complete range of products can be showcased within a small space
- It is done where a brand has been given dedicated space in the bay
- Here the different SKUs of the same category are displayed one below the other in the shelves. This has an high impact on the customers

#### Sizing



Fig. 2.1.3: Product Sizing

Once we have decided how the display is to be done, either vertical or horizontal, the next thing to be done is sizing of the product.

The thumb rule: Heavy and big products go to the bottom shelf and the small ones on the top.

The display should be done keeping in mind the product, the target customers and the thumb rule. Placing the heavy articles at the bottom most rack, will make it convenient for the customers to transfer the product to their trolleys. It is also easier for the staff to replenish the stocks.

However, in case of chocolates, keeping the target customers in mind (that is children), they should be kept at a height of 3 feet and the bigger boxes on top shelves. Chocolates and candies should be kept at a height of 3 feet up to a maximum of 5 feet.

### Facing



Fig. 2.1.4: Product Facing

Products when displayed on the shelf should not be placed in a disorganised manner. They need to be organised like the rank and file of the armed forces during march past. The products should be kept in a line. The brand name should be seen, facing the customers. The product detail label should be at the back or the side. There should not be any gap between the products. Not only horizontally, the depth should also be kept in a line. This is called facing.

**Facings:** The number of identical products or SKUs (Stock keeping units) placed beside each other on the shelf.

**Depth:** The number of identical products or SKUs (Stock keeping units) placed behind each other on the shelf.

Advantages of 'facing':

- It provides a filled look
- When products are more, chances are that the customers pick more of them
- It will help in covering empty spaces

### Level down and bring to front



Fig. 2.1.5: Level down and bring to front



As the products are sold, the shelves will become empty and there will be gaps to be seen. The stock should be replenished and fresh stock needs to be placed on the shelves.

Levelling is done when the stocks are placed on top of each other and the sides have become empty. In order to equal the height, more products are placed on the shorter ones and products are removed from the taller ones. Once this is done, the display will look good at the same height.

Levelling is done for the reason given below:

- **When shelves are partly empty after a product has been sold out.** It is quite common that the shelves become empty during the day. If the products are available, replenish them; if not, spread the next product to cover the gaps. Remember to leave a little space as an indication of gap
- **When walk-ins or customers are less in the store.** These arrangements can be made during the lean hours to utilise the time. Lean hours are those periods when the customer flow is at a low in the store
- **For ease of access to customers to pick products.** When organising the display, one should act as a customer and look at the display; check if it is customer friendly—with regard to details of products, price and accessibility
- **For better stock management.** If all the above are done but the stocks are not managed properly, the stocks would still get sold; but there would be no repeat customers. The stock levels need to be watched closely, reordering wherever necessary and checking for expiry dates on the shop floor

### Hang sell



Fig. 2.1.6: Hang sell

Not all products can be stacked in the shelf. There are products that may be required to be hung while being displayed.

Some merchandise are packaged in such a way that they need to be hung. For example tooth brush, batteries, combs, body wash, liquid soaps, etc. When the products are hang sold, the lighter ones will go to the top and the heavier and bulkier ones at the bottom. In a peg hook board, peg hooks will be placed in a line and not scattered across the board. After placing a peg hook first, decide on a suitable product to go in it and then adjust the height of the peg hook. This will help you to display the products without exerting much energy.

The deviation from the regular type of box or bottle packing is to position the product as a premier one.

Thumb rule: First get the height correct or the distance between the rows set and then place the other peg hooks before placing the products.

## Activity

- 1. Objective of the activity:** To help learners identify the different methods of arranging the products on the shelf
- 2. Learning outcome:** Learners will be able to identify the different methods of arranging the products in shelf
- 3. Procedure:**
  - Participants to identify the different methods of arranging the products in shelf
  - Divide the team into 4–5 groups
  - Give one topic each to the groups (from the topics given below)
  - Participants to prepare on the description and purpose of each
  - Ask them to stand in a line 10 feet away from the board. The first one writes a point and goes back to the end of the line. The exercise is repeated till all teams cover all the points of each arranging method. Time each group's points reflected on the board along with quality. The fastest and accurate team wins

The topics to be discussed are:

- Horizontal and vertical selling
- Size
- Facing
- Levelling down to front
- Hang sell

## Summary

- Role of a Trainee Associate in arranging the deliveries of merchandise for display
- Features of horizontal and vertical selling
- Features of sizing
- Importance of facing
- Importance of leveling down and bringing front
- Importance of hang sell



## UNIT 2.2: Labelling the Product Displays

### Unit Objectives

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

1. Identify the purpose and contents of Shelf edge label (SEL)
2. List the SEL rules followed in a display
3. Explain how to change SEL in a display
4. List the SEL printing rules
5. State the legal requirements which apply to pricing and ticketing

### 2.2.1 Shelf Edge Label (SEL)



Fig. 2.2.1: Shelf edge label

The label which gives the details of the product is called the SEL or shelf edge label.

The SEL for each product displayed in the store can be seen on a fixture or shelf. This is placed in a plastic holder called the data strip. Since the data strip is attached to the shelf edge and the label is placed in it, it is called the SEL.

- It is called SEL in B2C (Business to Customer) and in B2B (Business to Business) most organisations call it SET or Shelf Edge Ticket
- SEL communicates to the customer the product description—MRP, selling price and size of the product
- Some organisations have the placement of the product also incorporated in the SEL itself with details which comply with POG or Planogram
- The SELs are to be maintained by the associates on the shop floor whose duty is to maintain the SEL across the store
- Positioning of SEL is done by one of the given designated staff at the store:
  - Price coordinator
  - Audit team
  - Aisle staff
- SEL is the first thing to get into the display and is the last one to be withdrawn from a display

- The image shows the components in a sample SEL or ticket

#### Barcode Label

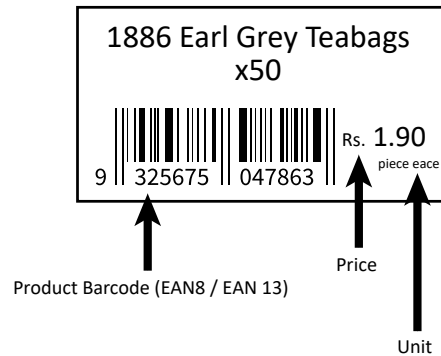


Fig. 2.2.2: Sample SEL

#### SEL rules

The SEL rules should be strictly adhered to; there is no compromise on the following rules:

- The SEL should be placed only in the data strip and should neither be stuck on the shelves nor handwritten
- The SELs are to be placed at the right bottom of the first piece of an SKU. Meaning, it should be right under the first piece on the extreme right or customers' left. This is the universal practice
- When placing the SEL, care should be taken that there is space for placing other SELs and there are no duplication of SELs
- The shelf talkers will be placed to the left of SEL. Shelf talker is a printed card or any other sign attached to a shelf to invite customers' attention to a particular product displayed in that shelf

#### Changing SEL for new displays

- Ensure that all products on the existing display has an SEL
- Re-position all existing SEL without compromising on the basic rules
- New SELs are to be placed when there is a change in price, description or volumes/units
- POG or planogram should be followed at any given point of time
- When a new product is introduced, the POG team will give a new planogram and the place of the existing SEL will need to be changed
- Care should be taken as already mentioned on the details of a SEL
- Check for offers, discounts and the new price before placing the SEL
- Reconfirm if the details appearing on the SEL match that given in the POS and the product
- Checking the correctness of the SEL throughout the store is the job of one of the Trainee Associates
- Where there is a discrepancy, correct SEL would be required to be placed
- Do not waste stationery. First confirm if the discrepancy has been corrected and only then print the new one
- Whenever there is a display change, print new SELs and shelf talkers so that it is appealing to the customers

- When there is a change in the description, price or volume of a product, change the SEL
- When an SEL is soiled, torn or faded, change it. They reflect the efficiency of the operations team in the store
- Follow SEL printing rules

Print SEL only when required. Exceptions are given hereunder.

**Printing rules:**

- When there is a free product attached to the parent article
- When an offer price is given on an existing product
- Any offer relating to the price or other needs to be printed
- Discounts will have to be highlighted in SEL, hence a new one will be printed
- Certain organisations have different sizes of SEL for food and non-food. In order to maintain uniformity across the stores, the dimensions of the label is to be taken care of
- Checking of prices can be done through HHT (Hand Held Terminals)



*Fig. 2.2.3: HHT machine*

- If any discrepancy is found, a new SEL would be required to be printed

**Legal requirements which apply to pricing and ticketing**

There are many legal requirements to be complied with. The basic requirements are highlighted here:

- All products and labels will carry:
  - MRP
  - Selling price
  - Unit of Measure (UOM)
- At no given point of time, selling price should be greater than the MRP
- If there is a price change, the old price should be seen
  - If the price has increased, the new label can be placed on top of the old price
  - If there is a decrease in the price, it should also be seen by the customer
- Handwritten price tag is not permitted
- When there is a display outside the store, then a nominal advertisement fee is required to be paid,

if the local rules demand

- The signage if illuminated from within, a show window display facing the road attracts taxes in some parts of the country
- All UOM should be clear and no tampering is allowed
- Contravening above rules will result in non-bailable warrant
- Certain states in India do not allow luck dip as part of promotions. Ensure that no local rules are broken

## Activity

- Objective of the activity:** To help learners identify the components in an SEL
- Learning outcome:** Learners will be able to identify the components in an SEL
- Procedure:**
  - Identify each of the following component in the SEL:
    - Name of the product
    - Price
    - Units
    - Unit measurement
    - Size
    - Barcode

### Barcode Label

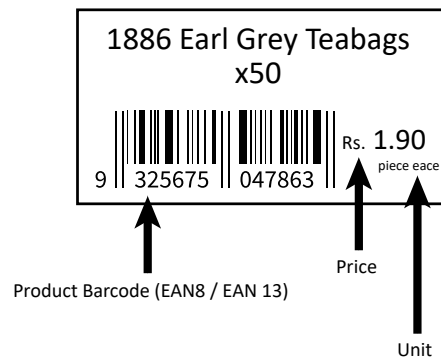


Fig. 2.2.4: Sample SEL

## Summary

- Purpose and contents of Shelf edge label (SEL)
- SEL rules followed in a display
- Changing SEL in a display
- SEL printing rules
- Legal requirements which apply to pricing and ticketing

## Exercise

**Answer the following questions by choosing the correct option:**

1. Similar products are placed next to each other to form a horizontal pattern.
  - a. Horizontal display
  - b. Vertical display
  - c. Sizing
  - d. None of the above
  
2. What is the full form of SEL?
  - a. Shelf Extent Label
  - b. Self Edge Label
  - c. Shelf Edge Label
  - d. None of the above
  
3. What is the full form of HHT?
  - a. Hand Held Terminal
  - b. Hand Held Tender
  - c. Held Hand Terminal
  - d. None of the above
  
4. What is the full form of UOM?
  - a. Unit of Medication
  - b. Unity of Medication
  - c. Unit of Measure
  - d. Unity of Measure
  
5. What is the full form of SET?
  - a. Self Edge Ticket
  - b. Shelf Edge Terminal
  - c. Shelf Edge Ticket
  - d. None of the above

**Answer the following:**

1. What are the reasons for which leveling is done?
2. What are the advantages of facing?
3. What do you understand by the thumb rule?
4. What is horizontal display?
5. What appears to be the role of the trainee associate?



## 3. Preparing Products for Sale



Unit 3.1 - Fixtures Used in Preparing Products for Sale

Unit 3.2 - Maintenance and Usage of Fixtures

Unit 3.3 - Planogram

Unit 3.4 - Putting Products for Sale

Unit 3.5 - Putting Products Together for Sale



## Key Learning Outcomes



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

1. Identify the role of different fixtures at the store in preparing products for sale
2. Outline the role of associates in setting up, maintenance and dismantling the fixtures
3. Identify the role of planogram in preparing products for sale
4. Prepare products for sale by following the display quality standards and procedures



## UNIT 3.1: Fixtures Used in Preparing Products for Sale

### Unit Objectives

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

1. State the role and importance of fixtures
2. List the different types of display fixtures and their purpose

### 3.1.1 Importance of Fixtures

Each SKUs (Stock keeping units) come in different size and shapes. An appropriate space and holder is required to portray the benefits of those SKUs and to create an interest in the customer's mind. This will also result in the ease of shopping.

- Fixtures are used to display the products at various locations in the store as per design
- Each fixture/s is unique in nature, depending on the store specialty, category, products and SKUs. For example a mobile selling store's fixtures are completely different from the ones selling fish, meat and vegetables

Fixture/s are based on:

- Design brief/planogram—provided by the merchandiser/VM/marketing team
- VM/Marketing aspect—their perspective of presenting the product in the best saleable manner and providing a good appeal
- Layout/location—chosen in terms of accessibility, market demands and promotional concepts
- Types of products—based on size, shapes, colours, textures, weight
- Quantity of products—numbers

#### Role of fixtures in a display

The purpose of fixture is to hold the product(s) for display in an attractive manner and also to help customers in selecting the products with ease.

With the help of design brief and planogram the appropriate fixture is chosen to create the perfect display according to the purpose defined.

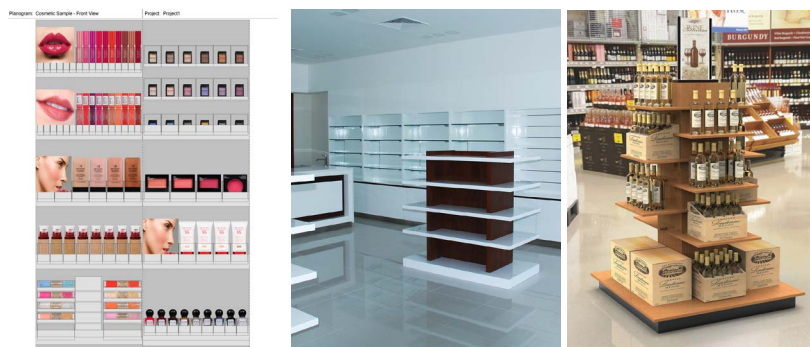


Fig. 3.1.1: Role of fixtures in a display

### Floor fixtures—gondolas

One of the most popular/common and frequently used floor fixtures is the 'gondola'.

The pictures in the slide show the different types of gondolas commonly used in a store—the island unit, wall unit and end-caps. They are used to stack and hang (using pegs/hooks) the products in different ways.

- Island unit—these are Gondolas with/without end caps depending on the space available. They are predominantly used in grocery, music and books retailing
- Wall unit—used to capitalise on available space along the perimeter of the store. These are used in grocery, music, books and footwear retailing
- End-cap—when the ends of island units are provided with shelves perpendicular to them, it is called an end cap. These are premium spaces which get sold to brands for a specific period of time for promotional displays

### Floor fixtures—browsers

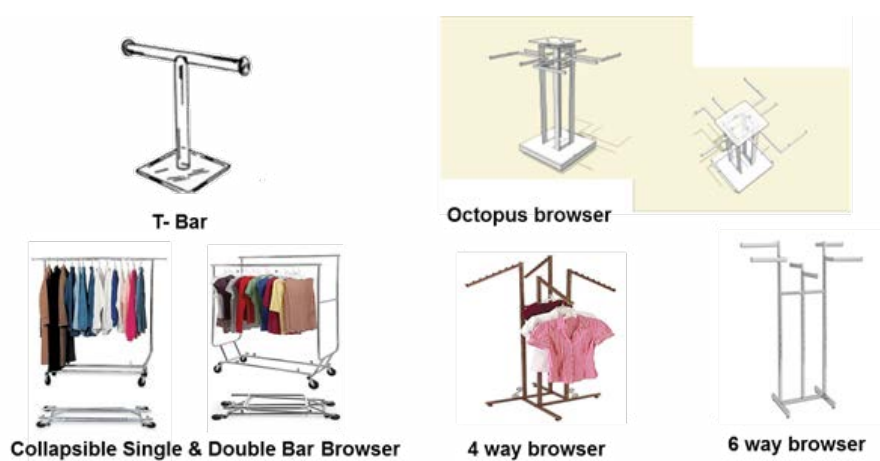


Fig. 3.1.2: Floor fixtures—browsers

Browser is a floor fixture where only hanging attachments can be used. This type of fixture is most commonly used in an apparel store. Various kinds of browsers are used across the retail stores. The most common ones are:

- T-Bar: This is used to display suits and ethnic wears. They height is adjustable
- Octopus: This type of fixture is predominantly used in kids' and lingerie sections. Because they have eight arms, it is easy to have coordinates for children. They also help in add-on sales, for example the lingerie. In the lingerie section, the panties and the camisoles may be displayed with short night suits
- Collapsible single/double bar: These are used in steam ironing garments on floor and also to transport merchandise on hangers from Distribution centre to the stores. They have wheels, which makes it easy to move them from one place to another
- 4-way browsers: They have four arms around them, either slanting or at 90 degrees. These browsers are used to display ethnic wear for men and women. These are used in women's western wear to display dresses as coordinates. Some stores use it to display men's formal and casual shirts and sometimes to display leather bags
- 6-way browsers: They have six arms and are predominantly used in kids' section to display tops and bottoms

### Floor fixtures—racks, shelves, tables and counters



Fig. 3.1.3: Floor fixtures—racks, shelves, tables and counters

Another most common floor fixture used in apparels is the browser, which is used for hanging attachments only. There are numerous types of browsers. A few of them are listed below with their purpose.

- **Spinner rack with tiers and hooks:** Can be rotated 360 degrees to have a look at the products with ease. Ideal for sunglasses, ties, belts, etc. These are used in artificial jewellery also where the drops and studs are displayed
- **Glass counter top display:** Can be hexagonal (as seen in the picture) or square. Best suitable to display colour cosmetics, expensive artificial jewellery. These can be static or have a 360 degree rotation for customer convenience depending on the design
- **Nesting tables:** Used to upsell and for add-on sales. It is designed in such a way that the smaller section or part is at the bottom and it progressively becomes larger when stepping up (like steps). This will attract customers' attention and they may end up buying both the products displayed, resulting in add on sales. A range of products in different price ranges can be showcased and this may help in upselling
- **Display shelves:** These are standalones or can be part of a chain of display shelves. Leather accessories and other accessories (cufflinks, tie clips, decanters and pens) are displayed. These could be open as well as closed with glass doors

### Perimeter/wall fixture



Fig. 3.1.4: Perimeter/wall fixture

The wall or perimeter fixture is placed along the wall or the perimeter of the store property to create a display.

The main purposes of such fixtures are:

- Optimum utilisation of space
- These fixtures are harnessed on to the wall, thus saving money and have provision for keeping stock below on the plinth
- They are used mainly in footwear and apparel display
- There are slats created wherein fixtures can be placed to hold the merchandise
- Image of the cross section of the slat wall is given below

### Slat fixture

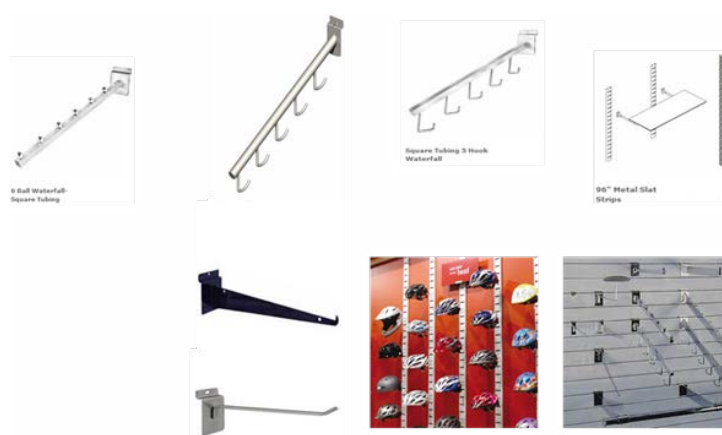


Fig. 3.1.5: Slat fixture

Slat walls are the most flexible ones for display, provided the right fixtures are used. The slat walls have a specific type of fixture as detailed in the slide.

- **Ball waterfall:** These are called waterfalls because when the garments are displayed, they look like a waterfall; if there are stoppers with a round head, they are called 'ball waterfall'. There are waterfalls which are plain and do not have a head
- **5-hooks waterfall:** These are used to display heavy garments, like suits or ornamental ethnic dress, as not more than 4 to 5 pieces can be placed at a time because of space constraint
- **Metal slat strips and side arms:** These are similar to the channels used at home. The difference is that these metal slat strips are flexible, in terms of number of holes. Shelves are placed with the help of side arms as seen in the image above, making it easy to adjust the shelves
- **Stooping rods:** These are used to hang sell from the slat wall. This saves space and accommodates a wide range of items
- **Picture hanger:** These are used to hang picture frames. A visual merchandiser can place this as per the design to create a visual treat. The slat wall can be kept intact as driving of nails can be avoided

## Peg hooks

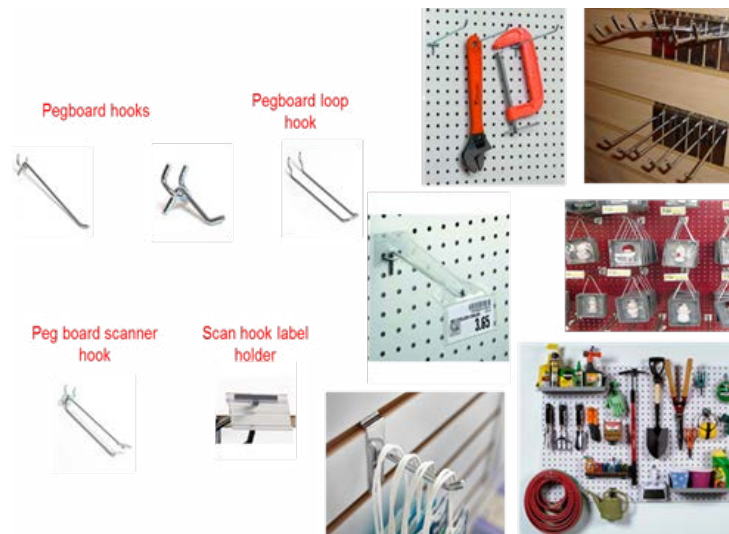


Fig. 3.1.6: Peg hooks

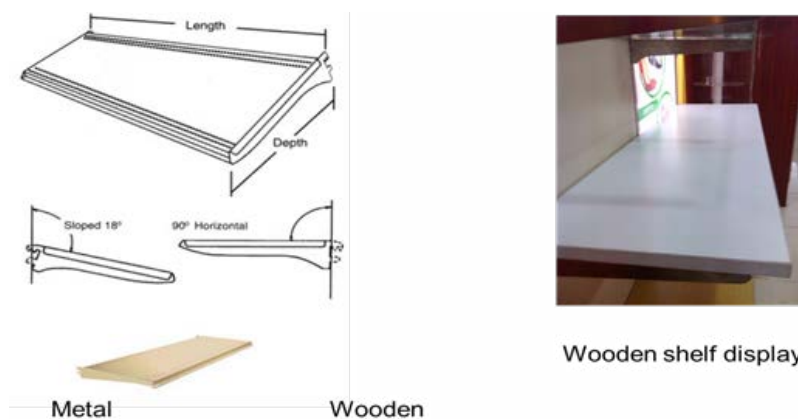
Peg board and peg hooks are other fixtures that help in saving space. The boards on which the peg hooks are lodged are called peg boards. These are used to 'hang sell' products. Stocks are hung on the peg hooks and they serve as a storing place also where the merchandise comes in 'Hang Sell' packing.

Peg hooks are of different types:

- Single rod pegboard hooks for light weight articles
- Loop hoop for medium weight articles
- Heavy weight articles are never on 'hang sell'
- Scanner hooks for very light articles. These come in lengths of 9" onwards
- The scan hook label holder, as the name suggests will house the self edge label (SEL) for the articles which are hung in its proximity

The pictures above show a complete display, where different use of peg board and peg hooks can be seen.

## Fixture attachments used for stacking—shelves



Wooden shelf display

Fig. 3.1.7: Fixture attachments used for stacking—shelves

They can be described as an adjustment for the structure of the fixtures which are removable and can be attached easily.

The benefits are:

- The number of shelves can be increased based on the quantity of SKUs
- It can be removed and stored based on the variation of stock/SKUs
- As it is removable, various heights of SKUs can be adjusted and stacked
- They are made from materials like wood and metal in various textures, colours, etc. based on the structure of the fixture

Various fixtures take their names from their place and assembly.

- Gondolas mean flat bottomed boat in Spanish. These gondolas can be moved to different places
- The gondolas have the uprights first. These are the stems which stand vertical
- The uprights are supported by arms and heels at the bottom. These get aligned and fastened with the help of screws or mostly by the clip method
- The uprights are placed parallel to each other and the bottom shelves are placed in such a way that they form an island, gondola or wall fixture
- Then in the notches in the uprights, the side arms are placed and shelves are lodged to complete the fixture
- These shelves usually come in 1200mm or 4' width
- The depths of these would vary, from 10", 13", 15", 17" and 19"
- It is the deepest at the bottom, since it has to take big articles and tapers as it goes up
- This would also give the customer convenience to pick up the articles placed at a higher level without any hassle
- Shelf fences are placed at the edge of shelves so that when articles are stacked one over the other, they do not fall
- Shelf fences are also used to make a division on the shelf, like a compound wall, demarking the space. They come in the lengths of 3' and 4'

## Activity

1. **Objective of the activity:** To help learners to identify various fixtures and understand the purpose of each
2. **Learning outcome:** Learners will be able to identify various fixtures and understand the purpose of each
3. **Procedure:**
  - Divide the participants into 3–4 groups
  - Provide each group with the following fixture sets
    - Group 1: Gondolas
    - Group 2: Wall/perimeter fixtures
    - Group 3: Slats and peg hooks
    - Group 4: Browsers
  - Take 10 minutes to prepare on the fixtures and their purposes with examples
  - Each team will form a line. The first person will write the fixture name on the board and go to the end of the line. The next person will write the purpose and do the same. The next person will write an example where the fixture is used
  - Repeat the exercise till all the participants contribute. The quickest team wins

## Summary

- Role and importance of fixtures
- Different types of display fixtures and their purpose



## UNIT 3.2: Maintenance and Usage of Fixtures

### Unit Objectives

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

1. List the usage of different fixtures in displays
2. State the importance of dismantling the displays
3. List the measures to ensure that parts of displays do not get damaged while dismantling
4. Assess the need to make adjustments and improvements to displays
5. Follow the process of storing the dismantled displays
6. Outline the process for items of display that need repair
7. Generate reports after dismantling and storing the display materials

### 3.2.1 Using Fixtures for Displays

Fixtures can be permanent and temporary, owing to the dynamic nature of retail business, promotions, new brand launches and festive seasons. If the store layout and design is going through a modification, these fixtures will also need to be changed.

- Ensure the fixtures are in good condition before setting them up—rust-free, not damaged, clean, no protrusions (this could be a hazard), etc.
- If any display fixture or equipment requires repair, inform and take action by informing the concerned officials and recording the same. Follow the process for missing or damaged items also. Escalate immediately and do not proceed further if any item is missing, damaged or has to undergo repair
- Take care and precaution—do not damage any fixtures/shelves/stock or the location while setting up the display fixtures
- Know the process to assemble and dismantle the fixture with the help of the manufacturer or maintenance team. They have instruction manuals which need to be referred to
- In case of special equipment, like extra lighting or drills required to set-up the display, arrange and inform the concerned technicians, electricians, carpenters, plumbers, etc. for setting-up the fixture/display
- In case of any deviation, unforeseen delay or disturbance in setting up the display, keep the seniors/superiors and other relevant authorities informed
- Once the campaign/activity ends, make sure the displays are dismantled and stored in a safe place. Record the location for future use

#### Reasons of dismantling a display

All displays need to be dismantled in an appropriate manner. Some of the key reasons for a display to be dismantled are:

- To save space—the space in the store is required for some other purpose based on priority
- Change in display theme
- Display is in working condition and could be a problem after assembling. This would require maintenance before it is used
- Display/fixture is not in working condition and requires to be repaired before being used
- Management decides the display to be dismantled and stored till further notice



- Display is not required anymore as it is outdated
- Another branch or store requires the display, so it needs to be dismantled, packed and transported

There could be many more depending on the situations and policies of the organisation.

### **Adjustments and improvements to display fixtures**

Adjusting a fixture happens for the following reasons:

- The layout of a department has changed, shifted or modified
- Quantities of products have changed—decreased or increased
- The products have to be presented in a different style for betterment and bring more sales

Rules to be strictly followed when the fixture has to be adjusted.

- Do not adjust a fixture with stock on it; this would damage the stock as well as the displays/fixtures
- Remove stock and place in the trolley/cage
- Align as per manufacturer's assembly instructions. Follow the instruction manual and keep in loop the subject matter experts

The following adjustments are made to meet design brief/planogram specifications:

- Adding extra shelves if there is a provision in the fixture
- Removing shelves which are not required
- Adjusting the height of shelves to accommodate products which are bigger in size
- Positioning hooks or pegs based in the products which are 'hang sell'

### **Measures for preventing damage while dismantling displays**

- While the display is being dismantled, keep the location and surroundings free of obstacles, so that there is no damage to the staff, customers, products, adjacent displays, etc. Do not damage walls/floors
- Create space by clearing the direction in which you are required to move. The way you might move the displays while dismantling requires the space in the right direction
- Remove stock from the fixtures before dismantling; never dismantle with stock. Store them in trolleys
- Align the display as per diagram while dismantling. In some displays, it may not be possible to unscrew all the screws at the same time. Some may have to be loosened first and then removed simultaneously to avoid crashing of the display/fixture
- Use appropriate tools and tackles. Keep the list of tools handy before dismantling
- Dismantle as per the steps mentioned by manufacturer's instruction manual
- To avoid damage to the display items/fixtures pack them properly as per instruction manual from manufacturer. Pack with materials, like corrugated boxes, expanded polyethylene foam, air bubble films, wooden pallets and crates for insulation
- Use packing material as per instructions in the manual

**Storing the dismantled displays**

The following steps should be followed while storing the packed dismantled display fixture for re-use or transportation to other locations:

- Identify and confirm location and space to be stored. Decide and confirm the space before dismantling
- Tag and label items of the display materials/fixtures with location details in the storage room or back-area
- Notify and record items that are to be repaired or are damaged and missing
- Plan the route and time for mobilizing the materials to the back-area or storage facility
- Record details in access register in the storage facility. The storage area cannot be accessed by all freely. Do not forget to sign in/out as per policy. Take confirmation from storage security supervisor on your material inventory stating the condition of the material
- Send items for repair if any and record the same for follow-up. Ensure that it is recorded after repair and stored in the storage location
- In case of non-availability or any discrepancy of space, inform and take action

**Fixtures that need repair**

The following steps are to be followed for items to be repaired:

- Identify and list the items that need to be repaired. Identify the vendor/OEM (original equipment manufacturer) service team, contact them and inform about the issue
- Schedule date/time of repair
- Complete repair as per schedule. In case of any deviation in schedule, inform the supervisor and concerned officials. Arrange for a reschedule and complete repair
- Check to ensure that the display is in proper working condition post repair
- Complete the necessary documentation
- Confirm next preventive maintenance call (if any)
- Record information as per process

**Reports to be prepared after dismantling and storing the display materials**

Information or details to be entered in the reports after dismantling and storing the display materials:

- Name of the display and the number of parts
- Tags and labels along with storage location
- Package type—carton, loose formats, free flowing, etc.
- Missing/damaged/repair details
- Reason for dismantling
- Relocation of the dismantled display—dispatch details, for example to other stores, etc.
- Storage room access information—log-in/out date/time
- Any escalation information

**Sample report**

Sl. no.	Items	Description	Missing/ damaged/ repair	Action taken	Follow-up date
1.					
2.					
3.					
4.					
5.					
	Signature of Associate with date and time	Verified by Storage Supervisor	Signature of Supervisor with date and time		

Table 3.2.1: Sample Document for After dismantling and storing the display materials

## Activity

- Objective of the activity:** To help learners to understand how to prepare reports after dismantling and storing the display materials
- Learning outcome:** Learners will be able to prepare reports after dismantling and storing the display materials
- Procedure:**
  - Prepare reports after dismantling and storing the display materials for the scenarios mentioned below:
    - One Christmas tree, assembled with one trunk and 15 branches
    - Total of 25 decorative items hanging on the tree
    - One large star fixed on the top
    - 5 decorative items are damaged, 3 are missing and one branch of the tree has to be repaired
  - Spinner rack (6 parts) with 50 soft toys hanging, using 10 peg hooks
    - 25 soft toys are sold
    - 15 are remaining
    - 5 are stolen
    - 5 are damaged

## Summary

- Usage of different fixtures in displays
- Importance of dismantling the displays
- Measures to ensure that parts of displays do not get damaged while dismantling
- Need to make adjustments and improvements to displays
- Process of storing the dismantled displays
- Process for items of display that need repair
- Reports to be prepared after dismantling and storing the display materials

## UNIT 3.3: Planogram

### Unit Objectives

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

1. State the meaning of the planogram
2. Describe the need of a planogram
3. Show how to implement a planogram
4. List the key components of a planogram
5. State the role of a trainee associate in implementing a planogram
6. Justify the usage of a planogram to prepare and implement displays
7. List the planogram implementation checklist
8. List some common problems faced during implementation
9. Outline the features of a sample planogram

### 3.3.1 Planogram

Planogram is a diagrammatic representation of the placement or position and quantity of the products. Usually it is in a story telling mode, where the entire store is laid out diagrammatically and then it culminates in category and sub category. The types of fixtures to be used will also be highlighted in a planogram.

#### Purpose of a planogram

- There may be an increase in sales as a result of the planogram. When articles are laid as per the planogram, it may lead the customer to make impulse purchases
- Customers will be able to identify the categories which they would like to buy and would also be able to look at alternatives to the product which they want to buy
- If the products are categorised under one family or category, it facilitates the customer to locate the products they need



Fig. 3.3.1: Planogram for Grocery

In various organisations, the planogram is designed, depending on the hierarchy. The general practice is that there is a space planner for each of the store and they in coordination with the buying department create the planogram which is directly related to the business plan also.

- Usually a store has a planogram when it is inaugurated, which over a period of time gets refined based on the product preference of the catchment area
- Within a year, there would be minor adjustments and thereafter it would be a major change of planogram

Changes in planogram would be necessitated, when a new product is introduced. If the change involves too many bays, then there would be a schedule which will enable smooth transition of Planogram.

### Implementing a planogram

Following are the steps in the implementation of a planogram.

- **Read the planogram:** First read the planogram and visualise how the finished Planogram would look
- **Prepare for implementing planogram:** Start listing things that would be required for implementing a planogram. It could be a fresh one in a new store or restructuring of an existing Planogram. If it is implementation for the first time, it would not be a challenge
- **Adjust the fixture:** When re-doing a Planogram, planning is required at every stage. Adjustments to the existing fixtures would be required. This would be possible only when the preparation is correct
- **Position the product:** Keep one piece of each product where they are supposed to be kept, leaving space for the number of facings to be given. This will help you in evaluating the space that is required. In case of lack of space, escalate it immediately to the supervisor who will resolve it
- **Labelling:** Once you have completed keeping the products, get the SELs printed and place it in the respective place. As already seen, the SEL will also communicate the number of facings (in most organisations). This will help the replenisher to refer to the SEL and complete filling of shelf
- **Price and range review:** Having displayed the products, take an HHT and check for compliance with the system prices and product description
- **Sign off:** Once satisfied that things are in place, call in your supervisor/manager to get this signed off
- **Planogram conformity check:** Thereafter keep visiting the bay for conformation—maintaining products in the same shape and quantity as it was on day one

### Role of a Trainee Associate in implementing a planogram

The role of a trainee associate in implementing a planogram are as follows:

- The correctness of implementing the planogram
- As seen earlier, in case of any doubt get it clarified before moving on to the next step
- First place the products in their position and ensure that all products fit in and also have the number of facings as suggested
- Cross check with planogram once again
- Ensure that the fixtures used are as per planogram specifications
- Position of SEL is very important—ensure that they are in the correct place
- Get it approved

### Reasons to receive a planogram

The first time a planogram is executed is the initial period when the store opens. With time there arises the need to revise these planograms for various reasons as given below:

- **Scheduled range review**—Sales review of a range would be done and to boost the sales a change would be brought into the planogram
- **Result of new product launch**—A new product is to be launched but there is no shelf space. Number of facings for products may be redone to accommodate the new product which would result in a new planogram
- **Promotional product display**—Promotions would also force a change in planogram
- **Capitalise on a growth category**—When a particular category can grow only with a revised planogram
- **Emerging market segments and sub-categorie**—To present the product which would attract customers in new product category or segment

A planogram is accompanied by a set of guidelines which need to be strictly adhered to by the store. As discussed earlier, the Planogram change would be executed during 'silent hours' when there is no customer movement. But as an exception, if need be, minor changes in the planogram can be implemented during the lean hours of the day. This is done by the floor team. Guidelines for the change of planogram would come in from the space management team with appropriate instructions.

### Recipients of a planogram

Not everyone in the store would be sent a copy of the planogram. A planogram is not common across all retail organisations. It is part of the strategy of an organisation, and thus is sent only to select people. Usually it is the store manager and the department manager who would receive the planogram.

### Key components of a planogram

A planogram has got four basic components.

- **Fixture information:** Type of fixture to be used—height and depth. These have been worked out by specialists in the particular field. This would detail the location where hooks should come and the number of shelves to be used
- **Merchandising guidelines:** Layout of the planogram, suggesting the product which has to be kept, the quantity and how they should be presented on the shelves
- **Planogram diagram:** the detailing of planogram gets into the line level and would detail the product position and the number of facings. This would give a perspective on how the shelf would look once the planogram is complete
- **Product information:** Details of the dimensions of the product so that it can help in taking a decision during implementation of the planogram. The details of the existing and the new products would be given so that identification of the product becomes easy

### Planogram sample

The planogram sample given in the slide will give a perspective on how the completed display will look along with the dimensions.

- Various products, colour blocking, height of the products, grouping of the category
- Dimensions that are required to be followed for fixturing
- Detailing of the shelf spaces, depth of shelves to be followed and the number of shelves to be placed

- Shelf wise details of products:
  - Unique product code (UPC) code or the bar code number of the product
  - SKU number
  - Product description
  - Display as singles or cartons
  - Dimensions of the display piece
  - Number of horizontal facings
  - Number of vertical facings
  - Total number of pieces to be displayed

### **Preparing for a planogram implementation**

Before executing the planogram:

- Look at the fixtures in the planogram and the fixtures available in the store
- Evaluate the work that has to be done. This will help in splitting the work amongst the team members
- First and foremost is the fixtures. Do they match the specifications? If not, escalate and organise for the fixtures
- Listing of the requirements will help you in doing the display smoothly
- Ensure that the workplace is free of hindrance, for free movement while executing the display
- While planning for the execution of work, the first thing that is to be planned is to decide where the dismantled products are to be kept—in the display or as a reserve stock or to be returned back to vendor or all of these
- Only when you move the old stock out, you will have place to bring in the new ones
- If you have to juggle with the place, bring in the new, keep them aside, remove the old ones and pack them in the new products carton, labelling them correctly
- Get all props, signages and products together
- Check for availability to meet the requirements for change of Planogram as per specification

### **Planogram implementation checklist**

Use a checklist to finalise the planogram implementation. The checklist should mention the following points:

- Fixtures meet specifications
- Shelves' depth, width and colour as per specification
- Area where change is to be done is free of hinderance
- Right products have been brought for display
- Check for alignment and compliance to facings—horizontal and vertical
- SELs correspond to the products and are in place as specified
- Shelf talkers correspond to products where they are placed and are to the left of SEL
- New product highlighters are in place at the appropriate place
- Withdrawn products and fixtures are placed at their destinations



### Post implementation of planogram process

Once the display is completed:

- Clear the area of all debris (unwanted material)
- Sweep and mop the area so that the area is neat and tidy
- Pack the merchandise that was on display to be returned properly—label and store them in the designated place
- Go through the checklist and ensure that all the mentioned points are covered:
  - VM elements
  - Shelf talkers
  - Labels
  - Price tags
  - Size tags
  - Promo materials
  - Props
  - Proper lighting
  - Clean mannequins, no chipping off
  - Signages as per the specification
  - Window glass is free of finger prints and dirt
- Ensure that all legal requirements as already discussed are taken care
- Take a step back. Look at the display as a customer would from all directions and angles
- Make the required changes and monitor the display regularly for any disturbances
- Provide your report and inform the supervisor of completion

### Summary

- Meaning of the planogram
- Need of a planogram
- Implementing a planogram
- Key components of a planogram
- Role of a Trainee Associate in implementing a planogram
- Usage of a planogram to prepare and implement displays
- Planogram implementation checklist
- Some common problems faced during implementation
- Features of a sample planogram

## UNIT 3.4: Putting Products for Sale

### Unit Objectives

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

1. List the methods to identify the products the Trainee Associate is responsible to prepare for sale
2. List the key quality standards to be followed while putting the products for sale
3. Implement the methods used to check the condition of products on display
4. Follow the methods to put the products together and place them after they are assembled
5. Show how to deal with products that are damaged
6. Identify the process to manage waste

### 3.4.1 Methods to Identify the Products to Prepare for the Sale

From the design brief one would know about:

- The product to be taken from the stock room
- The props to be put—boxes, drapes, colours
- Display design—symmetric, triangular
- Planogram to be followed, if any—take a note of what are the adjacent and vertical brand blocking
- Number of facings and depth to be given

The Trainee Associate needs to carry out the following:

- Make a note of the offers, discounts/promotions and arrange the display accordingly
- Make a note of expected sale for the day and the product respectively
- Identify the products that need to be filled on the shelf on priority, that is the fast moving goods and the fast expiring goods are filled on the shelf first
- Follow the methods of FEFO (first expiry first out) and FIFO (first in first out) for perishable, chilled and frozen products
- Identify the gaps in the shelves and fill the gaps, by replacing the product from the backroom or store room
- If the products are out of stock ensure that the designated shelf is labelled as 'out of stock'

After considering all the above points, the Trainee Associate will be able to arrive at the number of pieces per article and the same can be taken from the floor.

#### **Key quality standards to be followed while putting the products for sale**

The following points need to be kept in mind while putting the products for sale:

- Check for damaged, spilled, broken or expired products and remove them
- Packed products should be dry and not soiled—without any leakages
- The product should be fresh—check for manufacturing date, BBD (best before date) and expiry date

- The product should be clean—no dirt or finger prints on it
- No bulging of the product in tetra packs or in CBD pet bottles
- All pre-packed articles should be sealed properly and there should be no spillage
- Electronic articles are only for display and not for sale
- Clean the shelf, corners, inner edge and bottom
- Check the expiry date
- FEFO and FIFO should be followed wherever applicable
- Ensure that the display is as per the planogram

### **Methods to check the condition of products on display**

Some methods that are used to check for condition of products:

- Scheduled routine quality checks
- Surprise audits
- Random pick and check
- Feedback from colleagues and customers
- Periodic check during working hours

As a routine, all products on display should be cleaned everyday morning and also checked for their functioning.

### **Food articles**

Keep the following points in mind with regard to the condition of food articles on display. These may be some of the ways in which we can ensure that the products are in good condition.

- Foods articles should be checked for expiry dates
- Check if the products are clean and there are no damages
- Check for any leakages in the packing
- Moist carton end indicates that there is a leakage inside the carton
- A deflated pack of wafers indicates air leakage
- Split blister packing is a sign of shoplifting
- A bulge in the tetra pack means that it is not suitable for consumption

These are some of the checks to be done on the products on display:

- Check for the expiry of non-food articles—cartridges, batteries, ball pen refills, colour pencils, glue sticks, etc.
- Check for scratches, dents and breakages—refrigerators, TV screens or music systems
- Check for life of battery in the remotes for the equipments on display

Finalise the display once it is clean and arranged in a neat straight line by viewing from the aisle side.

### **Methods to put the products together and place them after they are assembled**

Some products need to be assembled before they are put on display. The instructions for the assembly can be found on the carton containing. If the display has got a range of products which need to be assembled, identify and take the products to a safe place out of sight from customers.

Unpack the cartons and take the instruction slip. With the help of staff in your department, check if all the things mentioned in the instruction slip are available. If not, get them organised.

#### **1. Gather the tools you need for putting products together:**

- Check for tools required to assemble the products
- Assemble as per manufacturer's instruction and safety guidelines
- Ensure safety in terms of electrical appliance

#### **2. Check that products have been assembled correctly and can be used safely**

- Test the product for malfunction
- Report malfunction (if any)

#### **3. Take help when products are getting difficult to be assembled**

- Call for a technician in case of difficulties
- Report to supervisor in terms of any unexpected output

#### **4. Check regularly that products on display are in satisfactory condition**

- Do a routine check regularly to ensure that products are in working or saleable condition
- Remove damaged/expired products immediately and record the same as per dump process

Assemble all the articles and then shift them to the place of display.

### **Dealing with products that are damaged**

Extra care should be taken while organising a display. While displaying products there are chances that the products will get damaged. These products should be kept away from the ones to be displayed. Replace the damaged ones with a fresh piece. List the products under damages and keep them secluded in a specified place in the back office or Goods receipt (GR). Give the list of damages to your supervisor.

### **Managing waste**

The products that cannot be returned to the suppliers have to be disposed at the store and a record should be maintained. The process outlined by the organisation to categorise the products as waste or dump must be followed.

Ensure that proper documentation of the following is maintained:

- Register for dump
- Register for returns
- Register for transfer of products to other departments, like cut vegetables, fruits transferred to juice centres, etc.

## Activity

1. **Objective of the activity:** To help learners understand how to follow quality standards and handle damaged products
2. **Learning outcome:** Learners will be able to follow quality standards and handle damaged products
3. **Procedure:**
  - Learners to read the 2 scenarios given below:
  - Decide what action should be taken for following quality standards and handling damaged products for each of the scenarios
  - List the methods of quality checks and how to handle damaged goods
4. **Scenarios:**
  - A display unit has 300 units of shampoo pack. In this 10 have leakage and cannot be sold
  - Another display unit has 5 units of mobile phones of which 1 unit is not in working condition
5. **Debrief:** Explain the importance of understanding the process of quality check and handling damaged goods

## Summary

- Methods to identify the products the trainee associate is responsible to prepare for sale
- Key quality standards to be followed while putting the products for sale
- Methods used to check the condition of products on display
- Methods to put the products together and place them after they are assembled
- Dealing with products that are damaged
- Methods to manage waste

## UNIT 3.5: Putting Products Together for Sale

### Unit Objectives

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

1. Identify the tools used to put the products together
2. Outline the process to manage the sales floor
3. Identify the process to be followed whenever there is any difficulty in putting the products together
4. Justify the reporting hierarchy for sorting out problems associated with display of merchandise
5. Follow the method to get rid of the waste and unwanted packaging material
6. State the role of Trainee Associate in updating stock records to account for merchandise on display
7. Prepare reports after arranging the products meant for sale

### 3.5.1 Tools Used to put Products Together

Before the products are put together for display, all tools need to be checked. There are two kinds of tools required for display:

#### Document tools

- Design brief
- Planogram
- List of people who will be working
- Prototypes
- List of props which are to be used

#### Hard tools

- Material as prescribed in the design brief
- Props that are to be used
- Staple gun and staple remover
- Pins, blu-tacks, linen, glass cleaners, brush and dust pan
- Hammer, fishing twines, masking tapes, double sided tapes and scissors

#### Managing sales floor

- Ensure that the shop floors are cleaned in the morning
- Ensure that wet mopping and dry mopping of the floor is done as per the prescribed frequency
- Ensure that the ceilings and areas behind the chillers and shelves are cleaned and there are no cob webs
- Follow the store policy pertaining to the shelf life of the products in food, bakery and fruits and vegetable (F&V) sections
- Maintain proper personal hygiene, especially in food/bakery sections:
  - Hand washing

- Using gloves, aprons, masks and head covers
- Follow food storage guidelines of the store to prevent cross contamination
- Ensure that the temperature control mechanism is followed for chilled and frozen products
- Carry out face up and face over as per the store guidelines:
  - Facing up is pulling up the product to the edge of the shelf. Face over is spreading the product across the adjoining facings

### **Handling difficulty in putting products together**

The store staff should be aware of the exact escalation matrix in order to avoid confusion and to avoid parallel instructions. This will help them escalate the issue if and when they find it difficult to proceed while putting the products together.

- Identify problem—check if the same can be sorted by you
- If yes, sort it, else escalate it to supervisor/manager
- As per the instructions given, the merchandiser/buyer and visual merchandiser can be informed
- Act as per the instructions given by superiors/seniors

Each organisation has timelines for response to be received at every level. If the issue is not addressed in time, it will be escalated to the next level.

### **Reporting hierarchy for sorting problems**

As an associate, your first reporting will be your supervisor only. The reporting hierarchy in case of any problem with the display will be as follows:

- Immediate supervisor—sole point of contact for an associate. They should be able to sort your doubts/problems
- If not, go to the buyer who would get in touch with the vendor and get a reply
- If even that does not work, contact the visual merchandiser who will sort the problem

### **Getting rid of waste and unwanted packing material**

Maintaining cleanliness in the store should be the top priority of the store staff. Before, during and after display, take measures to make the place neat and tidy.

- Get a mobile waste basket to ensure that all the waste is dumped in it. All the waste from display should be thrown into the basket only
- If it fills up during the course of display, one of the team members should ensure that an empty basket is available
- After completing the display, all debris should be put into the bin
- Before leaving the display area, ensure that the waste basket is left at the allotted place for keeping the waste
- Before disposing it of, the security should check for any valuables may have been dumped by mistake
- Keep the housekeeping informed wherever required

### Updating stock records

The stock level of the articles on display should be checked at regular intervals. The stock book should be updated because there would be demand for the product which is on display.

The associate is responsible to ensure that whatever product is available on display is available for customers on shelf. This would be possible only if you update the stock.

In case of damages or expired products, stock controller should be informed for suitable action and updating records. This would help in tracking the effect of display on the sale.

### Reports to be prepared after arranging for sale

An associate is required to maintain certain reports which would help in future. The reports will have details about the following:

- Time taken for preparing the display—will help plan better next time
- Quantity of products that have been displayed—will help in maintaining inventory
- How many of them are on promotion and how many of them are repeats—will help to identify products which sell complimenting others
- Stock of each of the article on display—will help customer satisfaction and replenishment
- Sale of each of the product—will help for reordering
- Number of times a piece has been changed in display—will supplement the report on sales and also how many customers bought from the display itself
- Number of customers who have observed the display and bought and how many of them did not—will reflect the effectiveness of the display

These would be some basic observations which need to be reported in specific formats that might be given to you.

<u>Display Position</u>	<u>Start Date</u>	<u>End Date</u>	<u>Theme</u>
<u>Displayed by</u>	<u>Time taken</u>		
<u>SKU NO</u>	<u>Description</u>	<u>New/Old Display</u>	<u>Stock Level</u>
<u>1</u>			
<u>2</u>			
<u>3</u>			
<u>Recorder level</u>			
<u>Recorded</u>			
<u>Expected date of Delivery</u>			
<u>Contact Details</u>			

Fig. 3.5.1: Sample Document- prepared after arranging products for sale



## Activity

1. **Objective of the activity:** To help learners understand how to prepare reports
2. **Learning outcome:** Learners will be able to prepare reports

3. **Procedure:**

Based on the scenarios below prepare display reports

- Of the 20 packs of bath soaps displayed, 10 are to be sold as the offer is 'buy 1 get one free'. The stocks get over by 12 pm on day 1 of the display
- Of the 25 packs of washing soap, none have been sold for the last one month from the date of display

4. **Debrief:** Explain the action to be taken by the associate and the report to be filled

## Summary

- Tools used to put the products together
- Process to manage the sales floor
- Process to be followed whenever there is any difficulty in putting the products together
- Reporting hierarchy for sorting out problems associated with display of merchandise
- Method to get rid of the waste and unwanted packaging material
- Trainee Associate's role in updating stock records to account for merchandise on display
- Reports to be prepared after arranging the products meant for sale

## Exercise

Answer the following questions by choosing the correct option:

1. What is the full form of SKU?
 

a. Stock Keeping Unity	b. Stock Keeping Units
c. Supply Keeping Units	d. None of the above
  
2. \_\_\_\_\_ is a floor fixture where only hanging attachments can be used.
 

a. T-Bar	b. Browser
c. Octopus	d. None of the above
  
3. This is used to display suits and ethnic wears.
 

a. T-Bar	b. Browser
c. Octopus	d. None of the above
  
4. Used to upsell and for add-on sales.
 

a. Spinner rack	b. Display shelves
c. Nesting tables	d. Glass counter
  
5. These are used to hang sell from the slat wall.
 

a. Ball waterfall	b. Stopping rods
c. Picture hanger	d. None of the above

Answer the following:

1. What are the main purposes of fixtures?
2. What are the various kinds of browsers that are used in the retail stores?
3. What stands to be the purpose of a planogram?
4. What are the different types of peg hooks?
5. Name some of the fixtures from their assembly and place.





## 4. Provide Information to Customers



Unit 4.1 - Qualities Required of a Trainee Associate and Various Customer Styles



## Key Learning Outcomes



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

1. Identify the need to impress upon the customers by creating positive image in their mind
2. Explain the need to identify customer requirements and provide relevant information to them
3. Identify customer needs and provide relevant information on products and services to them
4. Follow the best practices of grooming and presentation of self at workplace

## UNIT 4.1: Qualities Required of a Trainee Associate and Various Customer Styles

### Unit Objectives

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

1. Know the qualities of a Trainee Associate
2. Identify the customer styles—characteristics and preferences
3. Respond appropriately to different customer styles

### 4.1.1 Customer Styles-Defensive

In the above role play the Trainee Associate needs to understand the behavioural reason why a certain customer may respond or react in a certain manner. Only then would they be able to respond or handle the customer appropriately to satisfy them or sell to them.

State the characteristic of a defensive customer. Then explain the recommendations for handling such a customer by using the points on the slide.

In addition, share the following points regarding dealing with defensive customers:

- Confirm the needs of the customer completely and proceed
- Know your products. Be sure about your recommendation (for example a particular feature in the product, etc.)
- Be confident
- Never contradict them or argue directly. Instead, present your case again
- Do not let them upset you!

#### Customer styles—Indecisive

Discuss and explain how to handle indecisive customers. State the characteristics of an indecisive customer and explain the recommendations for handling such a customer.

The key challenge in handling an indecisive customer is to try and get them to prioritise their needs and focus on choosing from a narrow set of the best possible recommendations. However, one should not get frustrated, as this may still not be an easy task given the nature of the customer!!!

In addition, share the following points that can help learners in dealing with defensive customers: See if there is any underlying logic to their needs.

Help the customer make up their mind by taking small decisions that lead on to their final key decision.

Be patient.

### **Other customer styles**

#### Characteristics

- Commanding and impatient personality
- Interrupt salespeople and look tensed always
- Expect fast results

#### Recommended handling

- Allow the customer to talk and understand the need fast
- Do not waste time; move quickly and firmly from one sales point to another
- Smile, be specific and positive

### **Decisive**

#### Characteristics

- Confident in their ability to make decisions and stay with them
- Open to new ideas, but want brevity (precise-ness)
- Highly motivated by self-pride

#### Recommended handling

- Do not memorise the product information
- The key is to assist
- Do not argue or point out errors in their judgement
- Avoid killing time, since they know what they want
- Speak confidently and to the point
- Make proper eye contact

### **Sociable**

#### Characteristics

- Friendly, talkative types who enjoy shopping
- Many have excess time on their hands (for ex-ample retired people)
- Usually resist the close of sale

#### Recommended handling

- Be more interactive with these customers
- Listen for points in conversation where you can highlight the benefits of the products
- Be patient, but consciously try to close the sale
- Give your suggestions and be friendly
- Sound positive



Impulsive

Characteristics

- Quick to make decisions
- Impatient, just as likely to walk out as they were to walk in

Recommended handling

- Watch for early signals for closure
- Strongly highlight the benefits of the product
- Match up to their speed—do not delay the process
- Avoid overselling

### Appropriate responses

**Speech intonation:** Take care of the pitch of your voice according to the mood and requirement of the customer.

**Body language:** Ensure that proper body language is used while conversing with the customer.

**Facial expressions:** This is a part of the non-verbal communication. Facial expression explains the interest the Trainee Associate shows in dealing with the customer type.

**Formality:** Be polite and follow the company formalities (greeting, explaining, etc.) while responding to the different customer types. Maintain dignity.

While handling the customers according to the recommended procedure, learn to look at the above aspects to ensure that your response style is appropriate and convincing.

**Remember:** The customer is analysing your verbal and non-verbal cues too!

## Activity

1. **Objective of the activity:** To help learners understand how to handle indecisive customers
2. **Learning outcome:** Learners will be able to understand how to handle indecisive customers
3. **Nature of the activity:** Role Play

#### 4. Procedure:

Allow them to plan for and practice the role play. Explain the steps to be followed.

- The customer says, “I want to buy a washing machine”
- The Trainee Associate understands the needs of the customer and shows the same
- The customer says, “Actually, I am wondering whether to buy a fridge instead”
- The Trainee Associate asks for more details and presents the options
- The customer says “What about microwaves? What is the range you have in it?”
- The Trainee Associate asks for details and presents the options
- The customer says, “Should I buy now or will there be discounts later at the end of the sea- son sale?”

- The Trainee Associate says, “The prices we have now are the lowest and best in the market” and asks for the customer’s decision (whether he is buying or not)
- The customer says, “Sorry, I am not able to make any decision on this. I will come back later” and leaves the store

Ask the class to observe the role play. Ask the class “What do you notice about the way the customer is behaving?” Collect feedback and discuss.

## Summary

- Qualities of a Trainee Associate
- Different customer styles—characteristics and preferences
- Responding appropriately to different customer styles

## Exercise

**Answer the following questions by choosing the correct option:**

1. What can be included in the decisive characteristics?
  - a. Highly motivated by self- pride
  - b. Not encouraging the new ideas
  - c. Being shy regarding their capability to make decisions
  - d. None of the above
  
2. What can be the recommendations for handling the circumstances?
  - a. Not allowing the customers to talk
  - b. Understanding the need of the customer fast
  - c. Not trying to be specific and positive
  - d. None of the above
  
3. This is a part of the non-verbal communication.
 

a. Interaction	b. Speech Intonation
c. Formality	d. Facial expression
  
4. Taking care of the pitch of your voice according to the mood and requirement of the customer.
 

a. Facial expressions	b. Body language
c. Speech intonation	d. None of the above
  
5. What can be the factors for recommending the handling process?
 

a. Watching for early signs for closure	b. Not highlighting the product's benefits
c. Embracing overselling	d. Not matching up to their speed

**Answer the following:**

1. What can be considered to be the appropriate responses?
2. What are the recommendation for handling various customer related circumstances?
3. What are the characteristics of being impulsive?
4. What are considered to be the sociable characteristics?
5. What are the various decisive characteristics?



# 5. Resolving Customer Complaints



Unit 5.1 - Customer Complaint Handling Process

Unit 5.2 - Customer Complaint Handling Process (contd.)

Unit 5.3 - Modes and Sources of Customer Complaints



## Key Learning Outcomes



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

1. Explain the importance of resolving customer complaints
2. Identify the modes and sources of customer complaints
3. Solve customer complaints in line with the sample standard operating practices

## UNIT 5.1: Customer Complaint Handling Process

### Unit Objectives

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

1. Identify the steps involved in the customer complaint handling process
2. Identify the organisation standards for timelines in responding to customer questions and requests for information
3. Identify the aspects of meet and greet
4. Identify when and why to probe

### 5.1.1 Service

- **Request:** A customer requesting for a service or additional service, for example home delivery, additional packaging, placing purchased products in the car, etc.
- **Complaint:** A complaint is an expression of dissatisfaction, for example a customer complaining about an expired product which has been sold to him, premises not clean, unhygienic environment, delay in billing, no parking place, etc.
- **Feedback:** This is the only way the benchmarks can be set. A customer providing feedback to improve the cleanliness of the store. Take regular feedback from customers and share with the team to improve

#### Complaint handling process

The steps in the complaint handling process:

- Meet and greet
- Listen and understand
- Apologies and acknowledge
- Provide solutions

#### First step—meet and greet

##### Steps to be followed

- Smile and greet the customer by saying “Good morning/Good afternoon/Good evening”—whatever is appropriate for the time of the day!
- Look at the customer’s face, make eye contact and talk
- Show interest in listening to the complaint by bending forward, so that the customer feels that he/she is being heard and attended to. Also, nod your head from time to time while listening, so that the customer will know that you are actively listening to the complaint. The anger of the customer if any, would calm down by this approach
- Ask questions in a caring, concerned manner. The more information you can get from the customer, the better you will be able to solve their problem. Asking questions helps to clarify the problem and identify solution
- First impression lasts longer. Make the customer comfortable and make him understand that you are there to provide solutions/solve the problems

## Second step—listen and understand

How to listen carefully and understand the problem of the customer?

### Steps to be followed

- Concentrate and listen carefully, do not get distracted
- Gather the required information to understand the problem
- Understand the problem and analyse the same—be empathetic
- Clarify and confirm the doubts with the customers. It helps to provide the best possible solutions
- Take necessary actions to solve the problem—be quick and help the customers

When a customer comes to you with a complaint about one of your products or services, listen carefully to what they are saying. They need to tell their story and feel that they have been heard. Once they have explained their problem, ask any questions you may have, to get a full understanding of the situation. After that, make suggestions on different solutions for the customer's problem.

### Need for probing

To understand the problem of the customer, you need to probe the customer.

- After meeting and greeting the customer, find out from the customer what exactly they want. For that customers need to be probed (examples from the slide)
- After listening to the complaint, try to get more information about the complaint so that best solution can be offered (examples shown on the slide)
- After collecting the information, clarify and confirm about the problem/complaint. By doing that, misunderstandings or future confusions can be avoided and the customer will also feel more comfortable. After listening to the complaint, apologise to the customer first. It gives the customer an impression that the company is taking responsibility (examples shown on the slide)
- After understanding the complaint, provide the best possible solutions or escalate the same to seniors. If you are handling the complaint, then make sure that you are with the customer till the end. If the complaint is escalated to senior/s, then give a correct picture about the complaint and help your senior/s to provide a solution and make sure that your commitment will be the same from the time you hear the complaint till you solve the same. Never get distracted or divert your attention (examples shown on the slide)
- If the customer is happy with your attitude, concern and solution, he/she will come back

### Responding to customers complaints, requests or feedback

- Every company has its own guidelines and process manuals. It is not appropriate to assume a process or guideline. The company service policy guidelines should be referred to understand them clearly
- Service Level Agreement (SLA): The SLA should be based on the company guidelines. The SLA states all details about the kind of services provided. It also elaborates how to respond to a service query: request, complaints or feedback. It also mentions the type of service: request, queries, complaints or feedback. It has details about levels of resolution based on hierarchy in the organization. It also mentions the turn-around time for each service
- Turn-Around-Time (TAT): It is required to resolve the issues raised by the customer. Each type of service has a TAT. It is important to resolve issues within the TAT mentioned against the service



- Follow the sample process provided below:
  - Receive from customer
  - Probe for complete details
  - Enter in your report/system
  - Refer SLA & provide TAT to customer
  - Resolve & inform customer
  - If unresolved, escalate
  - Provide new TAT to customer
  - Resolve
  - Record in report/system

**Remember:** The customer or vendor has his/her rights as much you and your store have rights!

### Types of complaints and examples

The type of complaints are related to:

- Price: Ensure that the labels are checked and printed properly before display
- Availability and range: Make sure that the feedback is taken and the range required for the customers is made available
- Quality: Remove damaged, expired products as per process and timelines
- Service: You are the image of your store, so make sure that the highest form of service is provided by creating new benchmarks in terms of service and quality
- Hygiene factors: Keep the store clean always and provide a healthy and safe environment

### Tracking complaints

- Capture information about the complaint and the action taken. It is necessary to record manually or in computer as per company service guidelines and processes
- If a customer requires follow-up, make note of the customer details in the report log/system and alert superior or relevant authorities
- Manage and maintain daily/weekly/monthly reports
- Take on-going action to rectify problems with products or processes

## Summary

- Steps involved in resolving customer concerns
- Aspects of meet and greet
- When and why to probe
- Responding to customers complaints ,request and feedback
- Types of complaints

## UNIT 5.2: Customer Complaint Handling Process (contd.)

### Unit Objectives

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

1. State the importance of listening to customer complaints
2. Discuss the importance of apologizing and acknowledging while handling customer complaints
3. Identify the proper tone and intonation to be followed when handling customer complaints
4. Understand how to provide solutions and escalate

### 5.2.1 Handling Complaints—Non-verbal Communication

**Active listening:** Being attentive, understanding the complaint fully and demonstrating willingness to help.

**Body language:** Being open and empathetic to create confidence in customers.

**Facial expressions:** Smiling, showing concern and willingness to help.

**Personal space:** Giving the customer space and time to make decisions. Interrupting and crowding the customer may lead to further dissatisfaction.

#### Why listen?

Listening to the customers is important for the following reasons:

**Makes the customer feel important:** Customers feel that they are taken care of and that their problems are given importance. A customer complaint should not only be attended to, but also be heard properly and understood, so that the solution is arrived at and the customer is satisfied.

Be attentive to the words, tone of voice and body language that the customer is using. Focus fully on to listen for any unspoken messages. For example if their body language starts opening and begins to close, either what you are saying or the manner in which you are saying it is not meeting the customers' need. If they are pausing in response to questions being asked, it might be a signal that they are not able to understand. A customer feels valued when enough care is demonstrated to listen to what they say and how they feel. Listening will enable to provide solutions to the customers.

**Shows your concern:** The most important reason to listen to complaints is very simple. If someone is complaining, the chances are, there is a problem in the products or services that is causing it. Listening to complaints allows finding out what the problems are with the business and solving them. The customer feels that you are concerned with their problem and would be happy that their problems will be solved and they would get refunds or replacements.

**Shows a willingness to help:** By listening to the customers, you show that you are willing to help the customer or are making efforts to help customer/provide solutions.

The cost to win a new customer is up to five times more than to keep an old one. Even if keeping a dissatisfied customer costs now, in the long run it will almost certainly save money.

If a customer complains, it gives a chance to make them satisfied with the business again, and for this reason, encourage dissatisfied customers to complain.

**Shows respect for the customer:** The customer would be happy that he is attended to and being given respect. If the complaint can be fixed quickly, it not only shows that the business respects the customer and wishes to provide a good service, but also the reliability of the business, even when things go wrong. It can provide customers with a sense of security in, making them much less likely to go to competitors.

### Handling complaints—verbal communication

The following factors need to be kept in mind for the appropriate tone and intonation while talking to customers:

- Clarity of speech
- Calm and neutral
- Confident
- Empathetic tone
- Non-aggressive

### Third step—Apologise and acknowledge

- **Apologise:** Ask learners why they should apologise. Discuss and explain the points mentioned in the slide. Apologise to the customer and tell them how long they can expect to wait to receive a reply. Treat complaints sensitively and in a way that takes account of their needs
- **Use appropriate tone:** Use an appropriate and soothing pitch of voice to communicate with the customer. Talk to the customers calmly
- **Be empathetic:** Take the responsibility of responding to the customer. Put yourself into the customers' shoes and think. Understand the needs, feelings, problems and views of the customer
- **Take ownership:** Be proactive in taking responsibility for providing a solution to the customer's complaint
- **Acknowledge:** Acknowledge the customer's complaints. Let the customer know that you have understood the situation. Inform the customer that you are taking the matter seriously
- **Provide assurance:** Express confidence that the matter will be resolved to the customer's satisfaction. Inform the customer if the matter has to be escalated and also how long it would take to resolve the complaint approximately

For example "Did it break after one use? Oh, I can understand you were upset. I know! It would have made me mad. I'm sorry that it happened. Would you rather have an exchange or a refund?"

### Fourth step—Provide solutions

- **Suggest alternatives and confirm:** After understanding the problem, offer alternatives to the customers, so that they can select the best one. After they accept the option, confirm the same to avoid further confusions
- **Speed of action to make necessary arrangements:** Act on the solution with a sense of urgency. The customer complaint should be resolved in a considerably quick manner, so that the customer's problem is not prolonged for such a long time that the customer loses confidence on the store. Be fast and do all the necessary arrangements to make the customer happy

For example meeting the concerned department head/manager/taking the customer to the concerned department/section/getting a different brand/s, etc.

- **Execute the best possible solution:** Be with the customer till the problem is resolved and complete the process successfully. Whatever solution is chosen by the customer, be sure that you fulfill it to make the customer happy
- **Escalate, if required:** If you are not able to resolve a complaint or the customer wants only your seniors/manager to resolve the complaint, then escalate to your superiors. The seniors/manager will review the complaint and respond to the customer and attempt to resolve the complaint to the customer's satisfaction

### Escalating

- **Refer the superior to the customer:** If the SA does not have the power to resolve the complaints, or if they feel that they are not able to understand or solve the customer's problem properly, then the complaint should be referred to the immediate superior. If the customer wants the seniors/manager to intervene, then too, the complaint should be referred to the superior
- **Make arrangements to meet the superior:** The SA should make necessary arrangements for the customers to meet the superior/manager. The customer should be informed about escalating the complaint to the superior and superior should meet the customer to deal with the complaint directly. By this, the complaint would be solved quickly and with no ambiguity. It is always better if the superior can come and meet the customer personally, rather than the customer having to search for or take more trouble in going to where the supervisor is
- **Report to the superior:** Explain to the superior/manager the cause and the details of the complaint. This helps the superior/manager to understand the problem and deal with the same
- **Follow-up:** Follow-up to ensure that the customer is completely satisfied, especially when you had to take the help of others for solving the issue. Problems happen; it is how you honestly acknowledge and handle them which counts. Customers will remember you and give you another chance if you choose to offer them the best, proving that you value them

## Summary

- Importance of listening to customer complaints
- Aspects of apologising and acknowledging
- Proper tone and intonation to be followed when handling customer complaints
- Providing solutions and escalating

## UNIT 5.3: Modes and Sources of Customer Complaints

### Unit Objectives

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

1. Identify the different modes and sources of complaints
2. Identify the ways to respond to different modes and sources of complaints
3. Follow-up for complaints
4. Identify the methods to escalate the problems that cannot be solved
5. Identify when to refuse to accept returned goods
6. Identify the different needs of different customers

### 5.3.1 Sources of Customer Complaints

The main causes for customer complaints and the sources for complaints are:

- **Faulty products:** If the products are faulty/defective, the customer gets angry that he has been sold a faulty product and complains to the store and expects his complaint to be heard and attended. Make sure the store accepts the problem and provides the best possible solution to the customer. (For example the washing machine's water meter is not working/ indicator is not working, etc.)
- **After sales service:** This is a value added service that the customer expects to get from the store. If that is not done as expected or promised, the customer will be unhappy. The relationship with the customer does not get over once the sales closure happens. After selling, certain services like door delivery, installation, etc. should be carried out by the store/manufacturer. So, the store should help/co-ordinate to fulfil after sales services to the customers
- **Staff behaviour:** The staff has to be polite and calm while dealing with the customer. If they fail to do so, and behave in an informal way, the customer will be dissatisfied and angry. (For example not listening to the customers, arguing with the customers or talking rudely with the customers)
- **Service levels:** The required type of service level should be provided and the customer should be attended to in case of need. (For example store staff not providing personalised service or assisted service to the customers, i.e. not helping the customers in locating a particular department/product, etc.)
- **Billing errors:** These are errors committed by the cashier during billing, which makes the customers angry. It is to be resolved quickly. Understand the mistake and help the customer to solve the problem as early as possible because, generally customers spend more time in shopping, but hate to wait in the billing queue. If any mistakes happen during the billing, the customers get irritated and may create problems
- **Store facilities:** The facilities in the store should be well taken care of keeping in mind the customers' ease of shopping. If the store does not provide proper facilities to the customers, then the customers get annoyed and may stop visiting the store. (For example parking facility, elevators, escalators, A/C, Fans, Trial rooms, etc.)
- **Failure to resolve an issue:** If a customer's complaint is neither attended to nor followed up for a quick solution, the customer gets irritated and the issue becomes complex. So, make sure that all the complaints and issues are attended to and resolved as early as possible. (For example postponing the complaints of the customers saying that the new colours/designs are yet to come (earlier the store staff might have promised the customer saying "you can buy this product and later you can exchange it for a new colour/design")

**Modes of customer complaints**

The three modes of customer complaints are:

- Face-to-face
- Telephonic
- Written

**Face to face complaints**

- Listen carefully and apologise
- Understand the problem and empathise
- Ask questions and give feedback
- Be patient and attentive
- Speak slowly, in a normal tone of voice
- Avoid using slang or industry jargon
- Take ownership to solve the problem
- Escalate (if needed) and follow-up

**Telephonic complaints**

- Listen carefully and apologise
- Understand the problem and empathise
- Speak slowly, in a normal tone
- Ask questions and give feedback
- Note the details
- Take ownership and solve the problem
- If you cannot solve immediately, then ask the customer for a convenient time to call them back  
Make sure you call and update them as per the commitment
- Escalate to the concerned department or person if the customer insists

When a customer calls to complain, if the complaint cannot be resolved immediately, you should:

- Record their name, phone/mobile number, e-mail ID and details of the complaint in your re-port/system
- Categorise the complaint details as per your SLA code
- Advise the customer that you will call them back (if necessary)
- Provide an estimated time for calling them back
- Provide TAT for resolution as per SLA
- Resolve the complaint or escalate
- Call the customer back to let them know what action has been taken
- Record them in your report/system and follow routine daily/weekly/monthly reporting systems

**Written complaints**

- Be aware of the two sources—complaint letters and e-mails
- When customer approaches:

- Try to avoid a problem reaching a stage of getting a written complaint
- Understand the problem, apologise and try to solve it
- When customer drops a complaint
- If a written complaint is given, read and understand the problem; take necessary action to solve it
- Record and report complaint as per company policy
- Escalate to the concerned department or person

Written complaint is a letter, an email or a feedback form. In case a written complaint is received:

- Read and understand the complaint
- Categorise as per SLA and provide TAT
- Contact the customer to clarify the complaint (if required)
- Resolve complaint and respond to the customer
- If it was an e-mail then the response should be via e-mail or as per instructions in mail
- The response to a complaint in the feedback form should be the contact method selected by the customer on the form
- Sometimes it might be required to call the customer and inform about the action taken
- Respond to all written complaints as per SLA and TAT
- Record them in your report/system and follow routine daily/weekly/monthly reporting systems

#### **Follow-up complaints**

- Check if action has been taken against the complaint
- Explain to the customer that action has been taken
- Escalate as per organisations guidelines, if the issue is not resolved
- Ask the customer if they are satisfied with the resolution
- Report and record information as per hierarchy

**Remember:** REPORT—NOTIFY—RESOLVE

#### **Customers returning products**

- Refer the exchange/refund policy and process:
- Greet and acknowledge the customer
- Check if requirements for exchange or refund are met as per company policy
- Apologise for the inconvenience caused
- Exchange or refund the item if it is within time and date as per exchange policy
- Update your system information as per exchange
- In case of delay, inform the customer about the alternatives or date of delivery schedule and mode
- In case of a non-refund or no-exchange
- Empathise with the customer and understand his feelings
- Suggest alternate products/solutions
- Provide reasons with genuine justification
- Check with store manager/supervisor for exceptions; escalate if required
- Be transparent with the customer and abide by company policies

**Remember: CUSTOMER LOYALTY**

- Every customer has a unique way of expressing his/her needs. Remember the types of behaviours and act accordingly
- Find ways to understand each customer. Always refer or take help from colleagues
- Clarify and summarise their needs and requirements accurately
- Reassure them of the services offered at your store
- Record, follow-up and update all relevant customer records in your Customer Relationship Management (CRM) system

**Summary** 

- Modes and sources of complaints
- Ways to respond to different modes and sources of complaints
- Follow-up for complaints
- Escalation for problems you cannot resolve
- When to refuse to accept returned goods
- Different customers have different needs



## Exercise

Answer the following questions by choosing the correct option:

1. What is the full form of SLA?
 

a. Service Legal Agreement	b. Service Level Agreement
c. Self Legal Agreement	d. Service Level Authorization
  
2. What is the full form of TAT?
 

a. Top-And-Toe	b. Turn-And-Time
c. Turn-Around-Time	d. None of the above
  
3. \_\_\_\_\_ to complaints allows finding out what the problems are with the business and solving them.
 

a. Listening	b. Interacting
c. Facial expression	d. None of the above
  
4. The \_\_\_\_\_ of the customer if any, would calm down by this approach.
 

a. anger	b. concern
c. impression	d. None of the above
  
5. The \_\_\_\_\_ should be referred to understand them clearly.
 

a. company service policy guidelines	b. company sector policy guidelines
c. company service posting guidelines	d. None of the above

Answer the following:

1. What are the steps in the complaint handling process?
2. How to listen carefully and understand the problem of the customer?
3. What do you understand by the requesting service?
4. What needs to be done while attending to customer complaints?
5. What stands to be the need for probing?

# Notes



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How to retain customer

## 6. Promoting Loyalty Memberships



Unit 6.1 - Loyalty Scheme Basics

Unit 6.2 - Building Loyalty Memberships



## Key Learning Outcomes



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

1. Explain the need for Loyalty schemes in a retail store
2. Identify the methods of promoting loyalty schemes
3. Build customer loyalty memberships by enrolling them into loyalty schemes

## UNIT 6.1: Loyalty Scheme Basics

### Unit Objectives

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

1. Describe the features and benefits of the company's loyalty scheme
2. Describe the financial benefit accrued by a customer through loyalty schemes
3. Describe how the loyalty schemes help in achieving the financial objectives of the organisation
4. List the key offers available to customers under loyalty schemes
5. Identify the source of information from where the Trainee Associate can state the features and benefits of a loyalty scheme

### 6.1.1 Loyalty Programmes

A customer loyalty programme is a marketing effort which provides incentives to repeat customers and promotes loyalty of customers towards the store or a brand. It also benefits the store or the company by generating repeat business from the existing customers.

Loyalty programmes not only give the customer special offers, benefits and privileges but also helps them earn points on their purchases. These points can be redeemed for an equivalent value of purchases at the store on repeat visits.

Different names given to the loyalty programmes are:

- Customer rewards pro-gramme
- Customer reten-tion
- Loyalty incentive pro-gramme
- Frequent purchase pro-gramme
- Frequent shoppers pro-gramme
- Frequent buyer club
- Customer satisfaction programme
- Rewards programme
- Customer appreciation programme

Most of the retailers have branded these programmes as Elite Circle, Inner Circle, Classic members, Gold members, Platinum circle and so on.

#### **Purpose of loyalty programmes**

The purpose of loyalty programmes is to motivate customers to visit the store regularly and make frequent purchases. It also makes them aware that as a frequent purchaser it gives them certain privileges which is not offered by competition. The loyalty programmes generally come with a lot of bonus like:

- Discounts on purchase of products and ser-vices
- Special offers, prizes and gifts
- Points normally get accumulated and redeemed; for example if a customer purchases for r100 he might get 1 point accumulated on his membership card

### Features and benefits of a loyalty programme

Features	Benefits
<ul style="list-style-type: none"> <li>• Membership clubs</li> <li>• Point accumulation and redemption</li> <li>• Gift vouchers</li> <li>• Discounts</li> <li>• Special offers</li> <li>• Prizes</li> </ul>	<ul style="list-style-type: none"> <li>• Choice of products/services</li> <li>• Saving money on a long-term</li> <li>• Renewal with required product/service</li> <li>• Reduced price</li> <li>• Options to avail special discounts/services</li> <li>• Additional product/service based on lucky draws for example</li> </ul>

The loyalty programme helps the customers save a lot of money in the long run. It also helps them gain surprise gifts or prizes, access to special privileged services, etc. It also helps them gain access to newer products and get information in advance about special offers or schemes.

### Financial benefits for customers

The loyalty programmes offer the following benefits to the regular customers who make frequent purchases.

- Long-term savings through accumulation and redemption of points
- Card can be used at all branches of the retailer
- Privileged and special services offered only for members, like free car parking, home-deliv-ery, etc.
- Special schemes/offers provided by the store for loyalty scheme members informed well in advance through calls/SMS. Special wishes and offers during birthdays and anniver-saries
- Additional gifts, vouchers, coupons on promotions by brands, store, etc.
- Lucky draws, prizes based on occasional schemes

Apart from the savings, customers gain additional products/services based on the scheme.

### Financial benefits to the organisation

- **Retain existing customers:** In five years, a firm with a 70% customer retention rate will have lost two to three times as many customers as a firm with a 90% retention rate. The loyalty programme provides a real reason for frequent buying and also provides in-formation about the customers and their needs to be met more precisely

Using 4-year profile of new customer behaviour from a leading retailer, loyalty expert Brian Woolf has shown that, one year after becoming a customer, only two out of each thousand new customers (0.2%) were in the top customer segment and only twelve (1.2%) were in the second segment. Over half were inactive. Between 95% and 96% of the new arrivals were either in the lowest segment or had left by the end of the year. It is generally far more profitable to retain and upsell existing customers than to attract new ones.

- **Recover lost customers:** There are advantages with lost customers that may not be with the new customers. Information on old customers about their past purchase history and buying patterns, along with their contact details helps to recover them. The promotions and special offers can be used to motivate lost customers to come back to the stores
- **Marketing:** This is the cost effective method of marketing, involving hardly any cost. Spending more time, effort, and money on the best customers helps to gain more profits or maxi- mise returns

- **Create references:** Customers who are satisfied and pleased with the services will tell their friends and associates. To most people, a personal recommendation is far more convincing than any amount of promotional material they receive, even if they trust the brand
- **Manage pricing:** It also helps to structure the pricing. If enough customers are happy to buy a product at a particular price there seems little point in reducing the price. Besides helping to decide what pricing changes should be made, the after-effects of changing prices can also be studied by segmenting and testing offers on the members of loyalty scheme, for example, customer segments that buy significantly more or less when prices change, either gradually or suddenly
- **Respond to competitive challenges:** A good loyalty scheme connects customer purchases to individual customers. This helps quick identification of customers who switch loyalty. They can then be regained with customer-specific special offers based on their buying patterns
- **Reduce advertisement and promotion expenses:** Advertising based on segmentation of a loyalty database can be precisely targeted towards a segment. This helps in significant cost saving. There is no need to send out thousands of brochures or pamphlets that will be thrown away unread; or pages of newspaper space that is irrelevant to many of the readers
- **Plan optimal merchandising:** It helps in bringing products/services that are in demand and delete products that are not in demand. Regular visits of customers help in understanding the buying pattern and this in turn helps the stores to identify the merchandise type and the quantity that needs to be stocked. This will help the store in arriving at a strategy for sourcing optimal merchandise line resulting in savings of considerable amount of spends on merchandise that is not in demand

#### Key offers under loyalty programmes

- **Membership points and rewards:** Accumulation and redemption with special rewards. For example a purchase value of R1000/- could be redeemed with 600 points as a special reward for the customer
- **Seasonal:** Offers could vary anywhere on daily, weekly, monthly, quarterly, yearly schemes. Some stores provide special offers on birthdays and anniversaries of customers too
- **Festive season offers:** Regular discounts/offers are provided during occasions, like Diwali, New Year, Navaratri, Independence Day, etc.
- **Brand and vendor promotions (Channel loyalty):** Sometimes brands and vendors offer promotions which are passed on to the customers who are under the loyalty scheme. They are also provided based on the loyalty classification, like gold, silver, etc. For example brand Samsung could offer free check-up of mobiles and discount offers on specific purchase for 10 customers in a store. This could be passed to a set of loyalty scheme members through the store, instead of giving it to all customers
- **Free products/services:** Members are often provided with free products and services as gifts. Like holiday vouchers offering free stay in resorts
- **Discounts on products/services which are not offered to non-members**
- **Additional and privileged services, like free car parking, home deliveries, gifts to children, etc.**

#### Loyalty programmes—source of information

The loyalty programme/scheme details can be obtained from the following:

- Membership desk
- Customer service desk
- Cashiers
- Manager/HR office

- Store website
- Store brochures
- Special offer flyers/pamphlets

Most stores provide details in the billing counter (POS) and offer new membership cards.

#### **Loyalty programmes—statistics**

The loyalty programme statistics say that the potential in organised retail sector is R1, 36, 300 crores as per year 2012 PWC, Technopak RBI survey. This means the store has enough potential to generate revenue for the store using loyalty programmes as the key thrust area.

## **Summary**

- Features and benefits of the company's loyalty scheme
- Purpose of loyalty schemes
- Financial benefit accrued by a customer through loyalty schemes
- Loyalty schemes help in achieving the financial objectives of the organisation
- Key offers available to customers under the loyalty schemes
- Source of information from where the Trainee Associate can state the features and benefits of loyalty scheme



## UNIT 6.2: Building Loyalty Memberships

### Unit Objectives

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

1. Describe the usage of probing technique to gain information about customers and their interest in joining the scheme
2. Describe the method of handling objections of customers in relation to loyalty schemes
3. Describe the closing techniques that can be applied to gain customer's commitment to join the loyalty schemes
4. Describe the structure of the loyalty scheme enrolment forms
5. Describe the documentation process involved in the enrolment of a customer in a loyalty scheme

### 6.2.1 Probing

Some questions/probes to understand customer needs of a loyalty scheme are given below. Also refer the session on understanding the meaning of retail selling and sales processes.

- How regular the customer purchases are in your store?
- This helps in getting information on the buying pattern/frequency of the customer's purchases
- What do they purchase?
- Type of merchandise, products, SKUs, quantity, etc.
- Where do they purchase from?
- Other places of purchase—nearby Kirana stores, other stores, etc.
- What is their expectation from the store regarding the cost and quality?
- Why should they come to your store?
- Purpose like vicinity, special products, schemes, offers, discounts, etc.
- What are the savings expected from the store purchase?
- If it is a monthly purchase based on their basket size amount saved in rupees
- What is the outcome expected from the loyalty scheme and additional services?
- Special privileges like parking, home delivery, speed of services, special products, schemes, offers, discounts, etc.

#### Handing objections

Some frequently asked questions (FAQs) based on customer's doubts on loyalty schemes:

- What are the privileges the loyalty scheme offers?
- Will I get benefits which I do not get elsewhere, or what is the difference in this store in terms of products/services?
- Not enough savings on the loyalty programme  
I purchase a minimum of `5000/- every month I do not get enough points.
- Competition offers better schemes
- Membership points do not get credited  
Loyalty cards are fake and there is no benefit in terms of points' accumulation.

- Validity of loyalty program on group stores  
Is this membership card valid in stores across India, other specialty group stores, etc.
- Charges levied on the loyalty programme  
Why should I pay for the loyalty card (if any)? It should come free of cost.

In such cases, welcome objections and listen patiently. Objections are a source for conversing freely with the customer. The more you hear, the easier it is to tackle the obstacles and close the deal.

The following steps help to interact with customers and enrol them for the loyalty scheme.

- State the benefits of the loyalty scheme clearly
- Explain matching the benefits against the customers' past purchase pattern
- State the advantages of your scheme over competitors
- Summarise with the savings/other benefits or privileges offered
- Introduce them to the membership desk team
- Empathise and assure you are there to solve loyalty scheme problems
- Do not over commit and under deliver

### Closing

Once probing has been done thoroughly and objections (if any) have been handled, summarise with details of the loyalty scheme matching the customers buying needs by stating benefits. Follow the steps below:

- Request customers to provide details for joining the loyalty scheme by providing the enrolment form. Assist them (if required) for filling the form
- Assure them the benefits once again
- Provide them with the loyalty card. Loyalty card could be temporary or permanent. In case of permanent cards, inform about the delivery schedule and details
- Recheck all details filled in the enrolment form
- Introduce them to the loyalty scheme team member or membership desk. Provide all contact details of store and membership helpdesk numbers, e-mail ids, etc.
- Provide entire details on how to use the card. It is necessary for all customers to carry their cards on every purchase
- In case of a lost or missing card, provide details on who they should contact
- In case of card forgotten during purchase, inform them of the process on how to reinstate their purchase details

### Structure of the loyalty scheme form and documentation process

Structure of an enrolment form should essentially cover the following data.

- Name, address and contact details
- Date of birth, anniversaries and family details
- Purchase pattern
- Income group: Not mandatory, depends on the choice of the customer
- Other membership's details: Other store membership details (if any)
- Temporary or permanent membership number (some cards are attached along with the enrolment form)

Stores have effective Customer Relationship Management (CRM) software to capture these details after the enrolment form has been filled in. This helps to process data for buying pattern behaviours, average basket size, total purchase details, etc. Also they can categorise the members into various tiers, like gold, silver, etc.

Stores require the following for enrolment into the loyalty schemes:

- Duly filled and signed enrolment form
- Address proof
- ID proof
- Signature in the enrolment form
- Photograph
- Business license (if B2B) with expiry date details

However, depending on the store the documentation process could vary. Some stores enrol customers without any additional documents. They require a filled form with signature and expect the customer to carry the card along with them during purchase.

## Summary

- Usage of probing technique to gain information about the customer and their interest in joining the scheme
- Handling objections of customers in relation to loyalty schemes
- Closing techniques that can be applied to gain customer's commitment to join the loyalty schemes
- Structure of the loyalty scheme enrolment forms
- Documentation process involved in the enrolment of a customer in a loyalty scheme

## Exercise

**Answer the following questions by choosing the correct option:**

- The purpose of \_\_\_\_\_ is to motivate customers to visit the store regularly and make frequent purchases.
  - discount services
  - loyalty programmes
  - special offers
  - None of the above
- Brian Woolf has shown that, one year after becoming a customer, only two out of each thousand new customers (\_\_\_\_\_) were in the top customer segment.
  - 0.2%
  - 0.3%
  - 0.4%
  - 0.5%
- The loyalty programme statistics say that the potential in organised retail sector is R1, 36, 300 crores as per year \_\_\_\_\_ PWC, Technopak RBI survey.
  - 2011
  - 2012
  - 2013
  - 2014
- What is the full form of FAQs?
  - Fast Asked Questions
  - Fast Allocated Questions
  - Frequently Asked Questions
  - Frequent Allocated Questions
- Usage of \_\_\_\_\_ to gain information about the customer and their interest in joining the scheme.
  - probing technique
  - B2B technique
  - Enrolment systems
  - None of the above

**Answer the following:**

- What do the stores require for the enrolment into the loyalty schemes?
- What are the steps that help to interact with customers and enroll them for the loyalty scheme?
- What are some of the FAQs which are based on the customer's doubts on loyalty schemes?
- What are the source of information for the loyalty programmes?
- What are the key offers under the loyalty programmes?

# Notes



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# 7. Maintaining Store Security



Unit 7.1 - Loss Prevention

Unit 7.2 - Store Security



## Key Learning Outcomes



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

1. Outline the various types of security risks at the store
2. Identify and report the security risks to the concerned higher authorities
3. Select appropriate methods to handle the security risks that fall within the purview of self-authority
4. List the impact of not following statutory guidelines with respect to store safety and security



## UNIT 7.1: Loss Prevention

### Unit Objectives

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

1. State the meaning of loss prevention
2. Identify the importance of loss prevention
3. Describe the terms 'shoplifting' and 'kleptomania'
4. Describe the types of losses and prevention measures

### 7.1.1 Meaning of Loss Prevention

Loss prevention refers to the in-store processes that reduce inventory losses due to employee theft, shoplifting, fraud, vendor theft, and accounting errors. It involves the methods that are used to reduce the amount of losses and shrinkage related to retail trade. Losses and shrinkage related to retail are shop lifting, card frauds, product breakage, etc. They are mainly categorised into known loss and unknown loss (shrinkage).

The objective of loss prevention is to maximise profits through reducing retail theft, also known as shrinkage. According to the 2006 National Retail Security Survey, retail operations suffered an average of 1.57% of annual inventory shrinkage in 2006.

According to the survey, shrinkage can be divided into five categories:

1. 46.8% due to employee theft
2. 31.6% due to shoplifting
3. 14.4% due to administrative errors
4. 3.75% due to vendor errors
5. 2.86% due to unknown errors

Although most retailers experience a shrinkage percentage of less than 2%, some smaller retailers often experience monthly and annual average shrinkage percentages as high as 20%.

Reducing shrinkage is very important and many retail stores have methods to control and reduce shrinkage (loss prevention programmes).

The importance of loss prevention:

- Reduces shrinkage (theft, damages, etc.)
- Maximises profits

### Shoplifting and kleptomania

**Shoplifting:** A common crime that occurs when someone steals merchandise offered for sale in a retail store. Shoplifting from retail stores costs merchants an estimated loss of 13 billion per year.

**Kleptomania:** Inability or difficulty to resist impulses of stealing. It is an impulse control disorder characterised by a recurrent failure to resist stealing. People with this disorder are compelled to steal things of little or no value, such as pens, clips, tapes, small toys or chocolates. Some may not be aware that they have committed the theft.

### Shoplifting: loss facts

Some facts about shoplifting and loss prevention will drive down the importance of loss prevention.

- 1 in every 10 people has shoplifted during the past 12 years
- 1 in every 2 people has shoplifted sometime in their life
- Shrinkage (shoplifting + employee theft + vendor theft + paperwork errors)
- Dishonest employees steal more than shoplifting customers
- Loss from employee theft is three times more than from shoplifters

### Types of losses and preventive measures

**Documentation error:** Wrong quantity/price/name of products can be found in the documents received from the warehouse as well as transfer-out documents that are sent to the warehouse. Check all the documents and take necessary steps to control the documentation errors. Do a thorough check of all the documents which are received from the warehouse/other sources and if any inconsistency is found, inform the concerned department to take necessary action and follow up. Likewise, check all the documents sent to the warehouse to verify if the quantity/price/name of the products are accurate and in case of any doubts bring it to the notice of your seniors immediately.

**Breakages:** Physical damage to the product can happen inside the store. Loading and unloading of stock should be done with utmost care. Proper stacking procedures are to be followed (while arranging stocks in the back room) to minimise breakages.

Improper handling of products can also damage the products. Do not throw, slide and push products while stacking. Utmost care should be taken while bagging the products at the billing counters. It is advisable to pack bottles, eggs, fruits and vegetables, dairy products separately to minimise damages.

If you see any customer holding baskets overflowing with products/a fully loaded basket, help the customer immediately, to avoid breakages.

**Billing errors:** Wrong billing (quantity, price, products, and offers) is another reason for losses. Proper training should be given to the cashiers to take care while billing, to minimise the errors. The cashiers should bill correctly and while billing they should check the quantities entered, price of the products, weight of the products, promotional offer prices, etc.

**Staff pilferage:** Misappropriation/misuse/stealing of products by the staff members. Create a good team and work towards one goal—reducing pilferages. Explain the impact of stealing to your colleagues (especially newly joined). Be alert and report to the seniors if any staff member is seen involved in stealing activity.

**Customer pilferage:** Customers take products without billing. When a customer takes a product and leaves the store without paying for it, it amounts to customer pilferage (the act of stealing). Be present and observe the customers in the respective departments and if any customer stays for a long time in any department, immediately attend to the customer and fulfil their needs. If you have seen any

customer pilfering the store products, immediately inform the security personnel and seniors. But, remember to be 100% sure before informing.

**Margin losses:** Wrong product pricing, barcode errors, etc. can happen in the IT department due to wrong price uploading and wrong bar code prices (warehouses). Check the system price against the MRP mentioned on the products on a regular basis to minimise loss. To minimise margin losses, check the system price against the MRP mentioned on the products on a regular basis and if you have any doubts immediately bring the same to the notice of seniors.

**Wastages:** Perishable products (for example frozen food, grocery, fruits and vegetables, processed foods, bakery products) must be checked and ordered correctly, and then stored and displayed as per the requirement of the specific product to prevent wastage.

The above types of losses are broadly classified into two major categories in retail—known loss and unknown loss (shrinkage).

### Known loss

- ‘Known loss’ is called so because the loss can be easily found and can be accounted in the stock books
- Products which are identified and cannot be sold to customers are classified as ‘known losses
- Examples of known loss include spoiled, broken, spilt, damaged and expired products
- Some of the losses can be accounted to the supplier/vendor and some of the partly damaged products can be sold at a discounted price. So, the store does not suffer all the losses mentioned in the given examples; however based on the damage, loss comes in the form of lower profits for the store
- Each item falling under the known loss category should be entered into the stock books as per company policies and procedures. Most software have separate codes for spoiled, damaged, expired, goods returned to vendor, etc.

It is the responsibility of the operations team to identify the kind of known loss happening at the store under various circumstances—while receiving, storing, displaying, selling and receiving from customer for exchange. It is also the duty of the operations team to inform relevant authorities and record such incidents to ensure the profitability of the store.

### Controlling known loss

- Check for appropriate quality and accurate quantity while receiving stock:
  - Spoilt
  - Damaged
  - Expired
- Unpack the products carefully without damaging the packing and contents
- Ensure that the products are stored in a secure and safe place, free of insects and pests
- Carefully handle products while arranging them in shelves or display areas
- Make sure your customers and staff do not mishandle and damage products
- Make sure you sell products before the expiry dates
- Follow the procedures and policies for exchange of goods
- Record all losses in terms of quality or quantity as per company policies

- Get trained in quality processes and update frequently
- Understand and identify the pattern for a specific type of loss
- Inform relevant authorities of such recurring pattern immediately

**Remember:**

- Poor quality products cannot be sold to the customers as this will affect the reputation of the store
- Not maintaining a record of 'known loss' results in loss for the store

**Known loss actions**

- Once you have identified a pattern of loss, discuss with superiors and colleagues to make a plan of action to stop the occurrence

For example, in a week's stock there are 100 packs of detergent in which at least 5 are damaged. This could have happened during transportation, while receiving the product carelessly, unpacking without proper tools, improper storages, mishandling while displaying. Find out the correct reason, make an action plan and rectify the same by following the correct procedure and ensure there is zero damage.

- If you find a product which can be partially sold, reduce the price (mark-down) after consulting superiors and send it for sale. For example the damaged products mentioned in the previous example cannot be returned to the vendor as the damage happened in the store. Since the detergent is intact and only the packaging was damaged, a lower price than MRP can be fixed and the product can be put on sale for the customers. This will help reduce the loss to an extent
- Dispose all damaged, expired products as per waste management policies and local government policies. For example a spoiled/expired food product could spread the bacteria to other products adjacent to them and spoil them too. A chemical based detergent which is damaged can accidentally spill on to other food/non-food products, spoiling them which make it non-saleable

**Remember:** Known loss is manageable and controllable.

**Unknown loss (shrinkage)**

Unknown losses are not known to anyone in the store and they come as a surprise while stock taking and profits disappear.

The reasons for such losses are:

- External theft—customers and vendors
  - Any customer can steal, use or consume without paying any product from the store any time  
For example using perfumes other than testers, eating fruits, drinking juice, etc.
  - A vendor can deliver only 9 eggs and can account for 10 or he can deliver 10, account for 10 and when out of sight can take away all the 10 and leave the store
- Internal theft—staff
- The staff can steal any product/cash any time from the store
- Shortage—difference in stock, actual v/s delivered
- For example some stock could be misplaced and not found due to improper storage practices
- Human errors during stock taking process

- For example while counting boxes of pens, 123 boxes may have been miscalculated as 125
- Accounting errors. During the stock taking process, the reason, code and quantity can be wrongly entered into the systems/record books

**Remember:**

Shrinkage can bring in heavy losses to the store.

**Controlling unknown loss**

Customers

- Sometimes they could be very friendly and will try to shift the focus of the staff, in the process of a theft. For example they might ask about parents, salary, etc. Such questions should be politely ignored, without deviating from the task
- They could be stealing knowingly or unknowingly in any part of the store
- The staff should be extremely alert always and should keep an eye on them

Vendors

- The vendors may try to bribe the staff, offering them gifts (for example a box of chocolates) for the hard work done. But these chocolates could have been taken from the store itself
- Accurate quality and quantity must be ensured while receiving stock from vendors. The box should be opened and all items should be counted and checked against the purchase invoice. Before leaving, the staff should ensure that the products are stored safely. Before entering into the system, the items should be rechecked
- The stock should not be left in the charge of a vendor in any case. The vendor is not part of the staff, so be cautious

Staff

- Colleagues may try to tempt you by saying “let’s enjoy a can of juice as there are many in stock” or “let’s take one pack of biscuits—it would not harm the store” or “we have worked hard today, so we should take R100 from the cash register”

As an employee, such suggestions should not be encouraged. This can jeopardize your career and can lead to a criminal case where you can end up in jail.

Shortage

- The items should be stored in a place that is accessible and can be easily located. This will ensure that stock is not misplaced
- There should be a list of stock with dates and the stored location. This list should be shared with relevant colleagues so that they can add and update any information they have

Human errors

- While doing a task, give undivided focus and do not encourage any diversion
- Re-count, re-check, cross verify
- Ask colleagues/supervisors to confirm the count
- Do not proceed further without investigating a discrepancy

### Accounting

- Recheck the stock units/cash units twice before entering the data into computers/records/reports
- Verify and confirm with colleagues/supervisors
- Ensure that the data is entered against the correct field. For example an expired item could be wrongly entered into partly damaged product
- Confirm before submission

**Remember:** Protect the store from theft, as you would protect your own belongings.

### Managing shrink—critical areas

Following areas, situations or locations need to be given attention to control shrink as they are common in retail stores.

- **Expensive/high value goods:** Watches, pen drives, razors and memory cards: these are some examples which require high attention as they can easily be pocketed. This should always be under lock and key and regular monitoring of stock should be done
- **Goods returned to vendors:** Pay attention to the quantity and verify the goods before returning it to the vendor. There could be some unaccounted return to the vendor which may result in shortage of stock for the store. Ensure it is recorded in the system accordingly with the value and reason code
- **Goods exchanged from customers:** Account these stocks against the correct reason code. Ensure further process is followed according to the exchange policy. For example a lady could have returned broken glassware. Check CCTV cameras during the delivery. Record reason code accordingly in the system against the value of the product
- **Back-store/storage room:** Ensure that the storage or backroom (depending on the store) is kept clean. Stock is properly arranged according to the receiving date and a document supporting the location and details about the stock is prepared. A clutter-free backroom ensures less of loss. Do not allow customers, vendors or unauthorised staff to enter the backroom. Keep a log book of entry and exit to the backroom

Some backrooms have refrigeration and cold-storage units which have to function without any interruption so that the stock does not get spoilt. Regular maintenance checks of these equipment should be done.

Segregate the goods to be sold, disposed and returned to a vendor in different locations.

### Waste process

- Recheck, verify and confirm before sending the product as waste. Products may have been wrongly accounted as waste and this will result in losing a sale
- Dispose waste immediately as this could spoil other products also
- Segregate waste and keep them away from goods to be sold

### Sales floor security

- Ensure all CCTV cameras and electronic surveillance equipment are working properly
- Monitor customers, staff and unwanted people on the sales floor
- Ensure mishandling of products by customers, staff and support staff, like security and housekeeping
- Children could take products, like chocolates or ice cream and consume it inside the store. Politely handle such incidents and avoid shrink

### Wrong pricing in labels

- An audit should be done of all products with the right price, using a hand held terminal (HHT) before the store is opened for the customer
- There could be a price change which has to be effective on the same day. Ensure it is done and the label matches the products
- Do not display a product without label or with a wrong price
- Verify and confirm for discounts, offers, etc.
- Recheck, verify and confirm before printing the price label on the products/shelves

### POS (Point of Sale) and Tills (Billing counters)

- A strict vigil should happen at the cash tills, POS or any billing counter
- Verify price against products while scanning. Similar products might have different prices, for example juices that come in different flavours/prices. A product may have a label with the wrong price, for example a watch worth R3000 may have a label with R300 printed on it
- Open all boxes, enclosed/packed items to take a count before billing. For example a box of Coke should have 12 cans. It may be billed for 12 cans when actually it had only 10 cans and a razor worth Rs 300 may be hidden inside the box or a child might have dropped a chocolate accidentally

### Security points

- Recheck, verify and confirm all items against cash paid before the customer exits the store
- Be alert for any suspicious activities at exit points

In case of doubt or any incident, please inform relevant authorities and do not hesitate to ask for help.

**Remember:** Protect the store from theft, as you would protect your own belongings

## Summary

- Meaning of loss prevention
- Importance of loss prevention
- Terms 'shoplifting' and 'kleptomania'
- Types of losses and prevention measures

## UNIT 7.2: Store Security

### Unit Objectives

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

1. List the types of security risk that can arise in your workplace
2. Identify the authority and responsibility while dealing with security risks, including legal rights and duties
3. Explain the approved procedure and techniques for protecting personal safety when security risks arise

### 7.2.1 Type of Security Risks and Reporting

Security risk applies the principles of risk management to the management of security threats. Risk management supports to identify threats, monitoring the effectiveness of the existing controls and determining the risk consequences.

Types of security risks are:

- **Theft, robbery, burglary, etc.:** A store can be robbed by breaking-in through windows, doors, roofs or any form of entry point
- **Vandalism:** Local vandalism is a common form of damage to the store, for example a local politician's death, communal riots, etc.
- **Bomb threats:** A bomb could be placed inside a store or sometimes a false alarm may have been raised
- **Acts of terrorism:** Terrorism could lead to direct attacks, hostage threats, etc. in the store
- **Bad weather or earthquakes:** Cyclones, extreme heat or cold conditions could prevent the store from running the regular business. Storms and earthquakes could damage and result in an unsafe work environment
- **Missing children:** In a crowded store, children could go missing or be kidnapped also

Additional tips for managing security risks:

- Be vigilant to identify and alert any kind of theft—customers, vendors or staff—“Always, anytime and everywhere”
- Ensure proper working of all security equipment by conducting a routine check everyday before the store opens for customers
- Keep a regular check on surroundings, local news, etc. to prepare well in advance for vandalism or terrorist acts. You might need this information in advance to evacuate the store before someone damages all products and harms the people inside the store
- Know the store hierarchy and keep their contact details handy along with emergency numbers, like police, fire, ambulance, etc. The name and contact details of all managers, colleagues, support staff, security, zonal office and head office should be with you all the time



### Authority and responsibility

A security has the general authority to detain someone if there is a probable cause that has occurred. But at the same time they have some limitations. A security can stop a person only if there is any genuine reason.

A security can never use excessive force, which includes but is not limited to application of pain, choking or improper handcuff use. Using of foul language, discriminatory slurs and verbal threats can also be considered excessive force.

### Responsibility:

- **Knowing security procedures and following guidelines:** Be prepared in advance to know the methods of handling emergency situations as per store operation processes or guidelines provided
- **Conduct periodic security drills and random checks:** Routine drills should be conducted by simulating a bomb hoax or storm. Involve customers and vendors by educating them about the need for such drills. After conducting the drill, evaluate and provide feedback in case any process is missed out
- **Following store opening and closing procedures:** A checklist for following the security measures should be provided and this should be followed for the routine/time scheduled
- **Update with local news and prepare:** Be in tune with local news for any kind of communal riots, bad weather, etc. This would help the store management to take action in advance and prepare accordingly to prevent a threat
- Know the store standard operating procedures to handle security threats

### Company policy, procedures and techniques

Each company has to follow safe policy and procedures to run the operations smoothly. Following are the procedure to be followed:

- Be aware of the store opening and closing guidelines as per policies
- Ensure that points to be implemented during crisis management are as per the SOP of the store
- Be alert in the store—have an eye for unattended parcels or bags
- Follow the process in case of missing child in a store and make an announcement
- Conduct simulated drills for staff, customers and vendors
- Alert the store with appropriate codes as per the training provided by security personnel
- Be aware of evacuation procedures for specific alerts. Know the procedures thoroughly
- Pass information as per process guidelines in a weather alert situation. Make amends and prepare in advance to take measures for the threat situation
- Ensure all security devices are in working condition—internal and external
- Make announcements at the store during threats
- Turn on/off the emergency alarms at the appropriate situations
- Keep contact details of police, civil defense teams, fire, ambulance, military (if available), hospitals, etc.
- Report and record details of drills as per routing, any unusual incidents/threats to concerned authorities
- Make sure not to share company security policies with friends, relatives or others. This could be a danger for the associate as well as the store
- Follow store opening and closing checklist

- Before opening the store:
  - If the alarm is triggered, never enter without police permission
  - Never enter the store without visual check
  - Set a safety reminder for repeat alarm call
  - Never enter a store alone
- Opening checklist
  - Open the store only accompanied by security
  - Check for tampered locks/alarms
  - Complete exterior perimeter walk
  - Unlock the store
  - Complete interior perimeter walk
  - Report police/authorities in case of theft/robbery/damage
  - Do not enter in case of any discrepancy
  - Refer opening checklist and confirm
  - Sign off opening checklist

Ensure all lights and air conditioning is on. Check for all fire exit emergency doors. Conduct visual check of any alarm system errors from previous night closure report. Compare previous night closure report and verify store conditions for any safety and security action required. Unlock the receiving area. Check and allow staff to enter the store and hand over entry door to security staff.

- Closing checklist
  - Close store to customers
  - Complete closing checks with cashiers, interior perimeter
  - Complete closing check with security, exterior perimeter
  - Check for people inside once
  - Enter alarm code and set alarm for the night
  - Lock and seal store
  - Refer closing checklist and confirm
  - Sign off closing checklist

Lock the front entrance doors for the customers exactly at the close time after announcement. Security or management should be monitoring the exit doors. Announce over speaker that the store is closed. Assist last customers with their shopping and to the exit (if needed). Security along with store staff should perform one last walkthrough of the entire facility to verify if all customers have left. Check the washrooms; and after all staff have left, lock and secure all remaining exits and entries.

Different types of Electronic Article Surveillance (EAS) equipment are used in store to prevent losses. These are detailed below:

- **Electronic surveillance gates:** These are found near the entry and exit of the store. If unbilled products are taken out, the gates beep/sound the siren and alert the security personnel
- **Tags, mini hard-tags and detachers:** Tags and mini hard-tags are found on the products. While billing, detachers are used to remove pins from tags and deactivate other security labels. The non-detached tags have sensors and if unbilled products are taken out of the store, the gates beep/sound the siren and alert the security personnel

- **Bar code sensormatic ultramax labels:** These are electronic bar codes stuck to expensive products, which are deactivated while billing. If unbilled products are taken out, the gates beep/sound the siren and alert the security personnel
- **Radio Frequency Identification (RFID or Soft tag):** An RFID tag is applied to or incorporated into a product for the purpose of identification and tracking, by using radio waves. These tags are deactivated while billing. If unbilled products are taken out, the gates beep/sound a siren and alert the security personnel
- **Close circuit cameras:** A Close Circuit TV (CCTV) is a video monitoring and security system used to transmit signals to a specific place on a limited set of monitors. It differs from broadcast television in that the signal is not openly transmitted, though it may employ point to point wireless links. A CCTV is often used for surveillance in areas that may need monitoring in the stores
- **Monitoring systems:** It is a procedure or process followed for monitoring and recording all the activities happening in the store. The store security personnel record and monitor all the activities to track theft

Know the process of activating and deactivating (only for certain purposes as per company policies) security devices by attending appropriate training. This training might include training by manufacturers, vendors or internal. This training needs to be regularly updated on any changes made inside the store or to the equipment.

Impact of not keeping the loss prevention and security equipment secure:

- The malfunction of security and loss prevention equipment or its exposure to security threats may lead to risking the lives and products resulting in huge losses
- In case of malfunction of any security equipment, alert relevant authorities immediately. You need to keep their contact details handy. Arrange for critical locations without cameras to be supported alternately, till the camera is restored for monitoring
- Conduct regular maintenance checks and reports of security systems in the store. Schedule or plan such routines and keep the relevant people posted in advance for such maintenance checks. Ensure that the camera recordings are stored date-wise and are made easily available and accessible
- Know the process of de-activating and re-activating certain electronics alarms to avoid discomfort to customers. This would be followed as per store policies

## Summary

- Types of security risk that can arise in your workplace
- Authority and responsibility while dealing with security risks, including legal rights and duties
- Approved procedure and techniques for protecting personal safety when security risks arise

## Exercise

**Answer the following questions by choosing the correct option:**

1. \_\_\_\_\_ refers to the in-store processes that reduce inventory losses due to employee theft, shoplifting, fraud, vendor theft, and accounting errors.
 

a. Shrinkage	b. Loss prevention
c. Documentation errors	d. None of the above
  
2. ' \_\_\_\_\_ ' is called so because the loss can be easily found and can be accounted in the stock books.
 

a. Known loss	b. Unknown loss
c. Differentiated loss	d. None of the above
  
3. \_\_\_\_\_ are not known to anyone in the store and they come as a surprise while stock taking and profits disappear.
 

a. Known loss	b. Unknown loss
c. Differentiated loss	d. None of the above
  
4. Watches, pen drives, razors and memory cards: these are some examples which require high attention as they can easily be pocketed.
 

a. expensive/high value goods	b. goods returned for vendors
c. goods exchanged from the customers	d. None of the above
  
5. What is the full form of POS?
 

a. Point of Selling	b. Point of Sale
c. Post of Selling	d. None of the above

**Answer the following:**

1. What are the reasons for the unknown losses?
2. How to control known loss?
3. What are the various types of losses and their preventive measures?
4. What are some of the factors about shoplifting and loss prevention which brings out the importance of loss prevention?
5. What do you understand by Kleptomania?

# Notes



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## 8. Visual Merchandising



- Unit 8.1 - Introduction to Visual Merchandising
- Unit 8.2 - Introduction to visual merchandising displays
- Unit 8.3 - Planning visual merchandising displays
- Unit 8.4 - Role of design brief
- Unit 8.5 - Principles to set up visual merchandising displays
- Unit 8.6 - Dressing up visual merchandising displays
- Unit 8.7 - Health and safety in displays



## Key Learning Outcomes

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

1. Explain the importance of visual merchandising in promoting sale of products
2. Identify the role of design brief in setting up Visual Merchandising displays
3. Outline the different methods of setting up a Visual Merchandising displays
4. Interpret design brief, source merchandise and props for setting up Visual Merchandising displays
5. Prepare a plan to dress up visual merchandising displays as per the design brief
6. Prepare Visual Merchandising displays to attract customers and promote sale of products



## UNIT 8.1: Introduction to Visual Merchandising

### Unit Objectives

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

1. State the meaning and importance of visual merchandising (VM)
2. Identify the factors influencing VM
3. Outline the features of a good display
4. Discuss the staff responsibilities towards VM
5. Identify the business impact of VM

### 8.1.1 Visual Merchandising

- Sells by showing and promoting
- Encourages the shopper to enter the store
- Gets the customer to pause and 'shop' the selling floor
- Establishes, promotes and enhances the store's visual image
- Entertains the customers and enhances their shopping experience
- Introduces and explains new products

#### Factors influencing visual merchandising

The right product display is selected by considering the following factors:

- **Type of business:** Based on the nature of business, the display pattern and style is decided. Example: Food, Apparel, General merchandise, etc.
- **Type of store plan:** Based on the store layout/plan, the display pattern and style are decided. Example: Bigger store, smaller store, store in a mall, etc.
- **Customer profile and location:** Based on the customer analysis/profile and location, the display pattern and style are decided. Example: Profile: A = High Class, B = Middle class, C = Below middle class. Location: heart of the city, out skirts, residential area, etc.
- **As per company display policy (Planogram):** Each and every company will have their own display policies and based on that, the display pattern and style are decided
- **Example:** In Shoppers' Stop, the arrangement of apparel (clothing) is different, when compared to Bangalore Central
- **Using different Visual Merchandising tools:** The display pattern and style depend on the different Visual Merchandising tools used. Example: Generally, show cases are used to provide display of wrist watches, mobiles, jewellery items, banners, promotional talkers, etc. that convey the right message to customers
- **Display v/s cost and space:** Based on the cost involvement, the display pattern and style are decided. Example: For high value products like jewellery, the materials used to display are usually of a high price

The space allocation is also done, based on the movement of the products. Example: Generally, more space is allocated for fast moving products and less space is allocated for slow moving products. This is to use the available space economically and to gain more profits.

Apart from the factors mentioned above, explain that the following additional factors will also influence Visual Merchandising.

- **Signage:** communication tools to attract customers towards the store and particular products, for example outdoor signage, banners, promotional talkers, etc.
- **Promo materials:** attractive promotional materials like danglers, talkers, etc. will influence Visual Merchandising and attract customers
- **Colour:** one of the most powerful tools in the Visual Merchandising segment. It is a visual perceptual property. Colours can be associated with emotions, special occasions and gender. It attracts customers into the store. A retailer has to focus on the right choice of colour that would match the theme of the display
- **Light:** appropriate and different lights (example: neon lights, focus lights, etc.) to highlight the place and the product inside the store. This increases the visibility of the products
- **Theme:** display themes to appropriately support the product  
A theme is a display of sale items of similar categories for example display of kitchen accessories. It is essential to have themes for all retail displays. They can be romantic, wild, or capricious, and should capture people's imaginations.

### Features of a good display

Features of a good product display are:

- Neat and tidy
- Attracts customers
- Space is utilised economically
- Creative
- Easy for customers to select the products

### Staff responsibilities towards visual merchandising

The responsibilities of a staff in product display are mentioned below:

- Understand 'how' and 'what' products are to be displayed
- Execute planogram
- Arrange promo talkers, signage and areas
- Ensure timely display
- Create good themes to attract customers
- Maintain VM tools neatly
- Replenish goods as and when required
- Dust the products kept for display
- Maintain a fully stocked appearance
- Check and replace expired, damaged, soiled products and illegible labels and tickets
- Take necessary action to rectify any changes to displays
- Check the manufacturing date and expiry date before the display of products
- Check package of merchandise
- Rotate products on a regular basis
- Monitor displays on a regular basis

### Business impacts

- **Unique store appearance:** Good Visual Merchandising offers a differentiated shopping experience for customers
- **Increases footfalls and sales:** Good Visual Merchandising attracts customers and educates them about the products offered and hence builds add on sales by suggesting coordinated products
- **Promotes new trends:** Good Visual Merchandising pushes new items which are presently in demand. It can also push the latest trends in fashion
- **Brings better margins:** A good shopping experience results in realising better margins in terms of Product, Service and Shopping experience

## Activity

### Group discussion

Ask learners about the importance of dressing professionally at work.

Discuss the following points:

- The importance of dressing professionally at work
- The need for it
- The benefits and the value of it
- Find out the way they would like to arrange the household items in their house

### Debrief

Highlight the reasons for a person to dress up well and bring out the following points:

- To create good impression
- To dress as per the occasion
- To maintain a professional look

It is important that household items in a house are arranged in a particular manner and the neat and tidy arrangement has the following advantages:

- Availability of items in one place
- Proper utilisation of space
- Placing the right product in the right place
- To have a good appearance that satisfies customers

The above points can be related to the retail store. It is important to present the store products in an organised manner, which in turn creates good impression on the customers and attracts them to visit the store frequently. Also explain why a retail store should be arranged in a particular manner (depending on the type of business and products).

## Activity

### Group discussion

Recall and discuss the arrangement of goods/products in a store during Diwali and Valentine's Day.

### Debrief

Outline the importance of arranging the products in a particular way in the given season or occasion. Also state how Visual Merchandising supporting tools and arrangements attract the customer and increase sales.

The following display arrangements can be seen in the festive seasons mentioned above:

- **Diwali:** Stores will have special Diwali offers on products and the same will be displayed at the entrance of the store, promo areas, near cash counters, etc. Different promotional materials like paper tapes, danglers and artificial crackers are used to give a festive look
- **Valentine's Day:** Stores will have special Valentine's Day offers on products, and the same will be displayed at the entrance of the store, promo areas, near cash counters, etc. Different promo materials like paper tapes, danglers, heart-shaped balloons, roses and chocolates are used and all these promo materials will be in red and white to give a festive look

## Summary

- Meaning and importance of visual merchandising (VM)
- Factors influencing VM
- Features of a good display
- Staff responsibilities towards VM
- Business impact of VM

## UNIT 8.2: Introduction to visual merchandising displays

### Unit Objectives

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

1. Identify the different methods of designing displays for different types of merchandise
2. Compare the different purposes of displays and their use in visual merchandising
3. Assess the key methods of choosing and combining dimension, shape, colour, texture and lighting to create the visual effect
4. List the advantages and benefits of different methods of designing the displays
5. Show how light, colour, texture, shape and dimension combine to achieve the effects

### 8.2.1 Methods of Designing Displays for Different Types of Merchandise

- Brand campaign
- Window display
- Thematic display
- Colour blocks
- General display in-store ( F&V, fish, meat, speciality, mobiles and televisions)

#### Brand campaigns

Brand campaigns are carried out by brands

When?

- When a new product is introduced
- Existing products require a push in the market

How?

- Through media advertisements and supplement them with VM

Where?

- Inside the stores
- Brand campaigns will be done profusely inside flagship stores or major retail outlets where they are present to support the electronic media advertisements and print media advertisements

When this is done, the recall of the product by the customers will be high and it will pay off for the advertisements.

### Thematic display

Displays that are made with a theme behind is called Thematic Display

- During Independence day or Republic day, all stores will be decorated with tricolor of our national flag. This is to coincide with the celebrations. This is thematic display
- During big sports events, many stores would deck their stores with highlights of the sport and also with information about a sports personality. This is also thematic
- During Halloween's most of the stores would have displays around pumpkin
- In February, all stores will be in 'red' to celebrate Valentines

All these efforts are to recall the event in the minds of the customers, and identify them with the product those stores offer. These are thematic displays.

### Colour blocking

Colour blocks are followed very systematically in all department stores.

VIBGYOR the seven colours of rainbow helps us in color blocking.

- Human eye should get used to the colors that are being offered
- A dark color will repel the customer from the product
- To train the eyes of the customers, the VM will organise the merchandise by the colors
- Instead of mixing the colours, they are grouped according to their shades and presented
- When displaying, it is always customary that the lightest of the colors is to the left of the customer and as they grow becomes darker. Here VIBGYOR helps in deciding which one comes first and what second, so on and so forth



Fig. 8.2.1: Colour Blocking method

In an apparel store the top shelf should start with white going to cream and then follow VIBGYOR to end in green and then black. Colour blocking is done to make the merchandise attractive and convincing for the customer to buy it. Colour blocking is done vertically and horizontally following the VIBGYOR colour cycle

Lightest colour is white moving to black using the VIBGYOR principle.

- Horizontally the shades should move from the lightest to the darkest
- During summers top left corner should be lightest and in winter's top left corner should be darkest

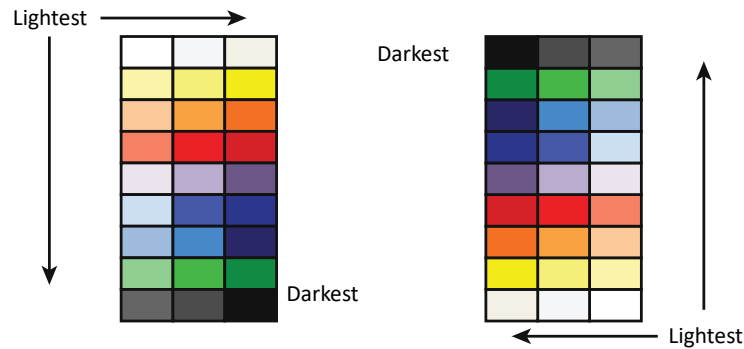


Fig. 8.2.2: VIBGYOR principle

### Window display

Window display as the term mentions are placed in front of the store which attracts the customer to enter the store and see.

- Window display can also be inside the store also, where there is place at the end of an aisle and products kept within
- Window displays are a representation of what is in store
- It is a teaser or an invite to customers to explore more inside the store
- In high end retail stores, one can see watches and jewellery displayed in windows inside the store
- In fashion retail, the window will be decorated based on the promotion or theme the store is following
- In earlier days, footwear organisations showcased their merchandise in what was then called a 'Show Window'

### Creating and achieving visual effects

Based on the design brief (design brief is discussed elaborately in the another session)—the planogram given, the location in which the display is to be done, the number of units to be displayed the choice would be made.

### Dimension

The ideal place would be suggested but the people on the shop floor can decide where to relocate the display depending on the size and number of units.

### Light

Depending on the place of display, luminence over there and the product category, extra lighting should be organised.

There are two basic type of lighting

- General lighting : To illuminate both merchandise and the pathways. It is immovable
- Accent lighting : Highlights particular merchandise or a set of merchandise. They are movable based on the store and display needs

**Texture:** Based on the product category, its value and the focus customer segment, the texture of the display would be decided. A rough terrain look will suit a denim product than a formal wear;

**Shape:** Repetition of shapes will improve the emphasis of the product instead of leaving just one piece on display.

**Colour:** Every colour has got a connotation and it depends again on the product once again.



*Fig. 8.2.3: Example of Window display in store*

Let us look at the above display.

- **Dimension:** Area is apt to house 5 mannequins, a bear as a prop and show cases the onset of winter
- **Lighting:** To provide the light and shadow effect with more light on the garments projecting the merchandise
- **Texture:** Is soft, going with the feminine touch
- **Colour:** The blue colour as a backdrop has enhanced the area of the window

Nowhere do we find light missing the merchandise.

The products have been very well coordinated for up selling and also demonstrate what is in fashion.



## Activity

- 1. Objective of the activity:** To enable the learners identify the effects of colour blocking, lighting, theme and branding in visual merchandising
- 2. Learning outcome:** Learners will be able to identify the effects of colour blocking, lighting, theme and branding in visual merchandising
- 3. Nature of the activity:** Group
- 4. Procedure:**
  - Divide the class into 2–3 groups
  - Show the slide
  - Ask learners to identify the different visual merchandising effects and list their advantages and benefits, starting clock-wise starting from picture 1
    - 1: Colour blocking and merchandise
    - 2 and 3: Lighting
    - 4 and 5: Theme
    - 6: Brand of the product
  - Allow each group to present their findings and summarise the advantages and benefits of displays in visual merchandising

## Summary

- Different methods of designing displays for different types of merchandise
- Different purposes of displays and their use in visual merchandising
- Key methods of choosing and combining dimension, shape, colour, texture and lighting to create the visual effect
- Advantages and benefits of different methods of designing the displays
- How light, colour, texture, shape and dimension combine to achieve the effects

## UNIT 8.3: Planning visual merchandising displays

### Unit Objectives

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

1. Identify the different purposes of displays and their use in visual merchandising
2. List the advantages and benefits of different methods of designing the displays
3. Justify the need to make adjustments and improvements to displays
4. Explain the methods of evaluating the visual effects of the display
5. Apply the dressing techniques for different types of merchandise

### 8.3.1 Different Purposes of Displays and Their Use in Visual Merchandising

#### Purpose

- Easiness to customers to locate product what they want to buy. Unless displayed, customers might not know. Remember there are customers who buy what they see!
- Once displayed, it becomes easy for the customer for self-service. This is easy for the retailer too! Customer walks in and takes the product to the billing counter; human intervention is low and hence overheads will be low
- When the display is attractive, it suggests to the customer what they should be buying and it helps the shopper to co-ordinate and accessorise. For example in apparel stores if a customer decide to buy a shirt, he can choose a pair of trousers that match, the tie that matches and the shoe to be worn
- Display suggests, recommends and demonstrates products at strategic locations. Like some of the display saying 'if you have not tried our product you haven't used any'. For example Pure it water filter. Demos of products on shop floor supplements the idea
- Display educates the customer about how each of the products they come across should be used and what are the benefits for the customer. Customer identifies what is the latest trend and buys it. For example demos of CDIT (consumer durables and information technology)
- products which supplement the display and the advertisement on the television
- Display helps in selling slow moving or outdated goods too with promotion

#### Uses in VM

##### Fruits and vegetables

General display of F&V should be in such a manner that it is pleasant to the eyes and lures the customer into buying them.

- F&V are usually displayed on lounges
- Grouping of F&V will facilitate buying by the customers
- Fish organised well will ensure that they are bought by the customers
- Some fish mongers would display fish and in the midst add props in the form of cut fruits or vegetables for decoration. This adds beauty to the display

- Meat when displayed, should be just enough for movement. Meaning, too much of processed meat when kept under cling wrap on the shelf, will not make a good impression on the customers

#### Electronic gadgets

The display of electronic gadgets or equipments should be in such a way that the customer is being offered a wide range of price.

- The display should be in such a way that it starts with the first generation model to the left of the customer to the latest to the right
- While displaying, care should be taken that they are grouped according to their basic technology
- It should also be taken care that the least priced one is to the left while the high priced ones are to the right of the customer

Similarly there are different purposes for apparels, luggage, toys, books, automobile, accessories, etc. The display should be at heights which are congenial for viewing, touch and feel experience.

**Remember:** Eye level is buy level!

#### Advantage and benefits of different methods of display

Each method of display has its own advantage and benefit.

Advantages:

- Provides a competitive edge over others
- Hygiene factors are far superior compared to local stores
- Good ambience and an unforgettable shopping experience
- The touch and feel of the product makes it different and the way they are displayed will ensure that the product is not damaged and at the same time they are easily accessible to the customers

Benefits:

- The product is accessible to the customer The touch and feel effect induces buying impulse
- All products in a category will facilitate the customer to buy more
- Appropriate ambience for each of the product
- Environment is created for the customer to decide by evaluating options

#### Need to make adjustments

Generally the need for adjustments in the display or improving the display happens for the following reasons:

- When a product to be displayed was not available earlier, but is available now
- When there is a product to be withdrawn since it is not available any more
- There is a change in the promotion
- Promotion has come to a close
- Display has been disturbed by customers
- Number of pieces to be increased in the display

- SKU changes in size, dimensions, weight, etc.
- Product quantity increased or decreased due to more/less sales

### **Methods of evaluating the visual effect**

The visual effect of the display can be evaluated in many ways.

The most common ones are:

- Sales reflection—Has the sale increased or gone down?
- Customer enquiries for the product—How many customers stopped and shopped
- Visual appeal—How many customers commended or criticised the display?
- Conformity to design brief—Has display met design brief specifications?
- The colour combinations—Do the colours blend or is an eye sore?
- Lighting—Is the lighting focussed enough on the product? Else just a waste?
- Aesthetics—Overall is it appealing or not?

### **Visual merchandising—Points to remember**

There is a customer circulation plan which is also taken into consideration when doing the VM across the stores.

- All that are put in the visual merchandise should go with the theme or the display etiquettes
- For example, a casual jacket cannot be put on a mannequin in formal dress and shoes
- Similarly the fittings also count and add value to display
- When one wants to promote a sports shoes, cannot once again have it on a formal dress
- For example when we put up on sale clothes in India, they ought to be in bins giving the sense of sale. If displayed none would touch them
- The right fixture should be used for display going along with the type of merchandise which is required to be displayed. A trouser cannot be displayed on a water fall; a suit cannot be put on a spinner. Each of them have specific type of fixtures
- As far as the fittings are concerned the type of boxes or lighting provided should be in tandem with the product displayed
- Lighting on displays should throw light on the product. They should be so organised that they do not hit the eyes of the customer. When this happens, the product becomes dull and chances of customer over looking or getting irritated is very high
- Signage should be talking about the offer, the product and the price. The price on the tag of the product and the one shown on the Display talker should be the same
- Each of the article in the display should be tagged properly and price ticketed accordingly
- Proper merchandising techniques should be adopted while displaying. Meaning, there should be relation in what is being done. A formal attired mannequin should be accessorised with related ones. It should not have a cowboy boots or a mexican hat
- As seen earlier the colour schemes should be followed. From the cloth on the podium, to the back drop, the colour of the tops to the bottom all of them should be in sync with one another
- Grouping articles by their category, sub category is very very important. One cannot afford to mix up and mess the design principles
- Putting up a display is as important as is maintaining them thereafter till the next change
- The displays should be visited on a daily basis and care should be taken

- Once you are complete with the display, take few steps back and look at it as if you were the customer. When doing that you will understand as a customer what are the shortcomings and how the same can be rectified
- If you were the customer will you like the display?
- If you were the customer, does it communicate what you wanted it to?
- Are you happy as a customer with the reply what you get? If the above three are answered then you have done your self evaluation of the display done
- But the way in which the product on display changes the trend in selling is the most important way of evaluating it. More customer likes it, more it sells

## Activity

- 1. Objective of the activity:** To help learners identify the various purposes of display
- 2. Learning outcome:** Learners will be able to identify the various purposes of display
- 3. Procedure:**
  - Learners to identify the purpose of display
    - A mobile phone launch promotional display
    - Surf detergent powder discount display
    - Diwali celebrations promo display
    - Misleading footwear offer. (Avoid such kind of shelf takers—‘TAKE ONE’)
    - In-store half-price promotional display
    - Fruits and vegetables discount promos
- 4. Debrief:** Explain the purpose of promotional displays and use of VM in such displays

## Summary

- Different purposes of displays and their use in visual merchandising
- Advantages and benefits of different methods of designing the displays
- Need to make adjustments and improvements to displays
- Methods of evaluating the visual effects of the display
- Dressing techniques for different types of merchandise

## UNIT 8.4: Role of design brief

### Unit Objectives

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

1. State the importance of the design brief
2. Describe the contents of the design brief
3. Follow the method to interpret the design brief to arrange a display
4. Describe the process of finalising potential places to put the displays as per the design brief

### 8.4.1 Importance of Design Brief

- Design brief provides the answer to the 5 Ws and a H for a display to be done:
  - What is to be done
  - Where it is to be done
  - Why should it be done
  - When can it be done
  - Who should do it
  - How should it be done
- The designing brief will also have details of an end picture for guidance
- The size of the place where the display is done will vary from store to store; hence there will be suggested place inside the stores where it can be done
- The reason for the display—the thought process behind it and what is expected of the display—will also be defined in the design brief
- The ideal time to do it would also be mentioned
- Who are the people who will be responsible for the execution and escalation matrix will be made available
- Legal compliances to be adhered to and major don'ts will be highlighted in the design brief
- The above are critical for executing the work and hence going through the design brief is very important for people who are involved in the project before starting of work

#### Contents of design brief

- The reason for putting up the display. This is important because till the person who is working is not able to relate the event and the display, the outcome will not be as expected. When putting up a Christmas display it should be mentioned that gift articles should be sold, new range of apparels and accessories. The expected result of the display, for example sales is expected to grow by 20%
- Duration of the display to be maintained with specifics (from and to date)
- Where the display is to be maintained—the precise location inside or outside the store
- The required props which are available and what would be required more
- The cost that can be spent on the display
- The dimensions of the props, platforms will be mentioned as per the type of stores and area
- Details of content for the signage
- Size of the signage

- Steps involved in putting up the display
- People who can be contacted for guidance and to clear doubts
- Lighting for high end retailing

### Interpreting design brief

- Interpretation of a design brief is the way one has understood the contents:

Content	Details
The reason for putting up the display	Occasion—festivity or sale? If it is for Christmas, the interpretation can be that it is the day of joy and celebration, stars everywhere, winter—snow capped trees, etc.
The expected result of the display	Impact of the display on customer and business
Duration of the display to be maintained with specifics	From and to date
Where the display is to be maintained	Location
The required props which are available and what would be required	Material available and what should be bought
The cost that can be spent on the display	Investment that would be required
The dimensions of the props, platforms will be mentioned for the type of stores and their area	Size of the display
Details of content for the signage	Dimensions of the signage and how to fix it
Steps involved in putting up the display	Step by step detailing of constructing the display
People who can be contacted for guidance and to clear doubts	Trained people who can execute the work.
Level of lighting for high end retailing	How should the lighting be organised or if extra lighting is required

Table 8.4.1: Interpretation of a design brief

### Process of finalising potential places to put the displays

- Study the customer flow

A detailed study of the customer movement has to be done to decide the potential places for displays. For example during Diwali, identify which sections will have the highest movement of customers. Customer traffic increases in all the sections, however it is higher in apparel, grocery, gifting and consumer durables. One can think of setting up cross promotional displays in these sections.

- Count the number of customers taking a right turn and a left turn at T junction within the store. Wherever the customer traffic is higher, one can think of setting up the displays.
- Check the number of customers who spend time on displays. Eavesdrop on the comments made by the customers and suggest modifications or change of place to the superiors
- Based on these, in order of preference in each of the department decide the places for display

### Some potential locations

The gap between two gondolas in which the customer walks is called as aisle. The aisle which is right in front of the entrance door and those aisles which runs around the gondolas are called as 'power aisles'. The other aisles which run between are called as secondary aisles.

Displays should be at those points where the customer will turn and continue to shop:

- Bulk display at the entrance
- The place at the end of the power aisle is a potential place
- The wall spaces close to 'wells' on the floor. (Display sections in middle of the floor, for example watch counter; mobile counter)
- Wide area in front of the POS where 'display islands' can be created

### Impulse counters at the POS

Given hereunder are the potential locations for display

- Windows
- It can be the show window facing outside or it can be windows inside the store
- Just at the entrance
- Right at the entrance where a customer will not miss it
- Entrance to department
- At the aisle which leads a customer into a department
- End caps
- These are situated at the end of the gondolas. Potential areas to improve the revenue of the store
- Near cash tills/POS
- Impulse counters at POS and those places which the customer will not miss to look
- Across elevators and escalators
- Those junctions within the store where the customer has to decide on the tour of the store
- Ends of aisles
- As said earlier, it can be on Gondola ends or as floor displays at the end of aisles

## Activity

1. **Objective fo the activity:** To help learners list the requiremenmts to set up a display
2. **Learning outcome:** Learners will be able to set up a display by considering the design brief
3. **Procedure:**

Ask learners to consider the image of any mannequin as an end result of a design brief, interpret them and list the requirements to set up this display.

- Merchandise—apparel, women's wear, casual/party wear
- Window display
- Track lights
- Mannequin used
- Golden coloured theme



## Summary

- Importance of the design brief
- Contents of the design brief
- Method to interpret the design brief to arrange a display
- Process of finalising potential places to put the displays as per the design brief

## UNIT 8.5: Principles to set up visual merchandising displays

### Unit Objectives

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

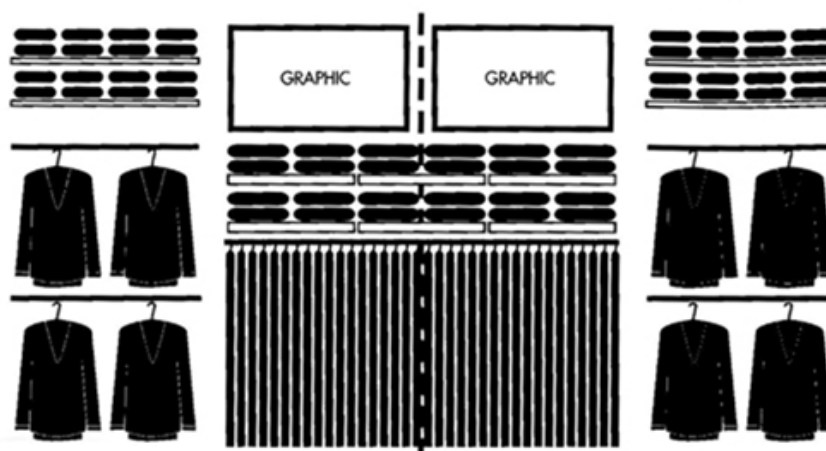
1. List the different types of merchandise groupings done in a display
2. Describe the features of symmetrical balance and triangle principle
3. Describe the features a focal point within a display
4. Describe the concepts of optical centre, rectangular, radial, repetitive, rhythm, group and harmony
5. State the role of displays in marketing, promotional and sales campaign activities
6. Show how attractive displays aid in achieving add-on sales
7. Identify the selling features of merchandise to be used in displays

### 8.5.1 Different Types of Merchandise Groupings

The types of merchandising groupings are:

- Symmetrical balance
- Triangular principle
- Emphasis
- Focal point
- Optical centre
- Rectangular, radial, repetitive
- Rhythm
- Harmony
- Adjacencies for cross merchandising

#### Symmetrical balance

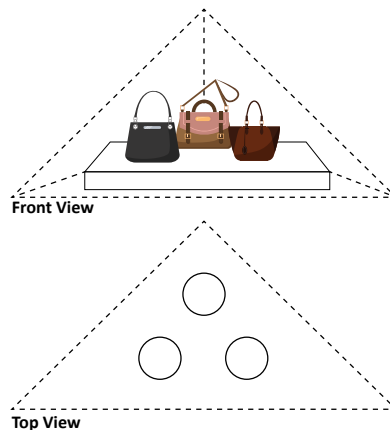


*Fig. 8.5.1: Symmetrical balance*

**Symmetrical balance:** When you look at the figure it looks like a weighing scale. The display is even on both the sides, the number of articles are spread from the centre evenly on both sides. Both sides are evenly balanced and even the ends at the right and left are balanced. These type of displays are called Symmetrical balance. It is effective in promoting classic products for important occasions.

Fixturing should always be done such that both the halves are balanced. This can be done by drawing an imaginary line in the centre, below the brand signage, so that both the sides look similar as illustrated in the image above.

### Triangle principle



*Fig. 8.5.2: Triangle principle*

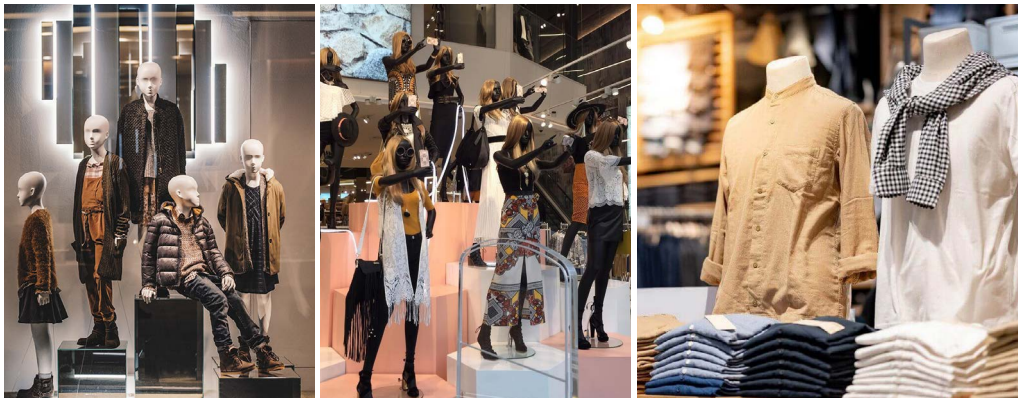
**Triangular display:** These are also called pyramid display—broad at the bottom and tapers to the top. Large sized articles are kept below and the smaller ones towards the top.

Imagine how a customer standing can look at the three vertices of the triangle and look at the products which would compliment each other. Triangular principle allows the customer to see all items in the display. Stand away from the brand at a central location on the aisle and imagine a 'V' line of vision and place the fixtures.

### Focal points

Focal point is the highlight location within the display that helps in focusing the customer's vision at the desired location.

Fixturing should be done such that it creates a focal point for the display.



*Fig. 8.5.3: Focal points*

- Focal point helps customers in decision making. They would be able to relate the product to its utility
- As the name mentions, the focal points gets the focus of the customers when they first look at the display

### Creating focal points

- Are created based on traffic of customers and where the display can get the focus of the customer
- The second focal point can be the place which the customer will not miss inside the store
- Having identified the place, put the products on display by referring to the design briefs

### Other merchandise groupings

Having got the location correct, the next step would be to group the merchandise to enhance sales.

- **Emphasis:** Emphasis on a theme or mood will be focused on the display. Since the eye movement of customers are from left to right, prominence is given to product to the extreme right to catch the customers attention

A display needs to emphasise a theme or mood, such as the use of sports equipment, work equipment or leisure equipment set up in a lifelike situation. Themes may also depict seasons, anniversaries, celebrations, holidays and other special store events. All elements in a display must then reinforce one other and emphasize the mood created.

- **Optical centre:** When a merchandise group is presented and the surrounding area is kept blank, the focus will be on the merchandise. This is optical centre grouping



*Fig. 8.5.4: Optical center grouping Display*

- **Rectangular, radial, repetitive:** When the products are grouped where a customer would be able to come around and view them either in right angles or in a circular motion, the customer will not miss the product



Fig. 8.5.5: Rectangular, radial, repetitive display

- **Rhythm:** In a display when there is focus on a product and then it leads to other products displayed which are subordinates, then we say the display is grouped in rhythm



Fig. 8.5.6: Example of rhythm grouping

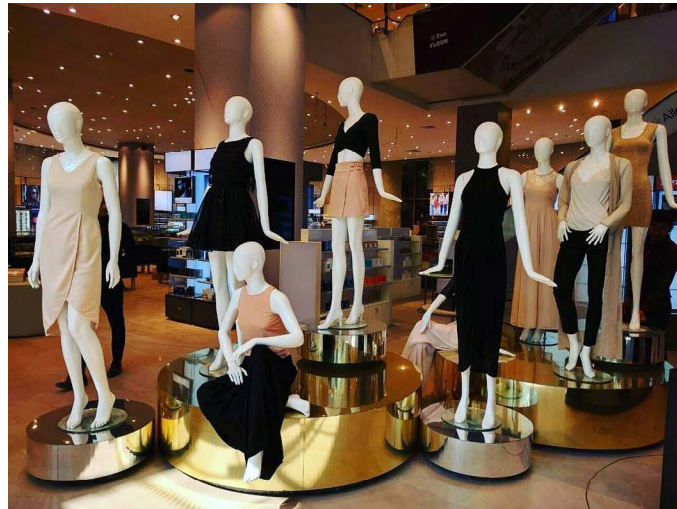
- **Harmony:** Harmony is a principle that can cover and incorporate every other principle being discussed here. Harmony is an agreement in feeling and consistency in mood that is the feeling that all parts of a display relate to each other and to the whole display. Without harmony, the observer is uncomfortable and will not be enticed to purchase merchandise



Fig. 8.5.7: Harmony Grouping

- **Adjacencies for cross merchandising:** As mentioned in focal point, adjacencies of products is also important, that is when accessorised properly vis-a-vis, trousers, shirt, socks, handkerchiefs, belt, shoes, bags
  - Products can be displayed in sets, to demonstrate 'one look' that is 'matching'. This will
    - Help in increasing sale

- Help in promoting weaker categories
- Make collection assortment look wider
- Give trend cues to customer
- Adjacent means 'next to'. Some rationales that are used for placing sets of products are:
  - Complimentary categories, for example shirt with a trouser combination or shirt within a suit or blazer
  - Accessories that go along with the mother product, for example belt with trousers



*Fig. 8.5.8: Adjacencies of cross merchandising*

The main principles of design used in display are balance, emphasis, rhythm, color, lighting and harmony. These principles apply to all displays—window and interior.

### **Role of displays in marketing, promotional, sales campaign and activities**

- Displays are the end-product of any marketing, promotional, sales campaign or any activity
- They are the front face of a store
- They are what the customer finally 'sees' in the store
- They provide the look and feel of any product to be sold
- They draw attention and increase footfalls in a store
- Overall they play a key role in enhancing the business of a store

### **Displays aid in achieving add-on sales**

Displays are done not just for the sake of doing but to help add-on sale:

- When products are displayed in coordinates ( trousers and shirt, shoes with socks, ear rings with necklace), it helps add on sales
- These displays will have the fast seller in focus and slow sellers around them so that they also get sold. When a cold coffee mix is in focus, a milk shaker displayed with it will also sell. Coffee is fast seller but not the shaker
- Display gives an impression of a very wide range of articles for the customer to buy. When the product is displayed repeatedly and its variances also displayed, it will show a wide range and will impress the customer



- For those customers who are not fashion savvy, a display prompts them about what's in vogue. Usually done with models and stars of the silver screen. Customers would identify themselves with the display and buy, knowing it to be the latest trend. For example: Kareena Kapoor's poster of a jewellery worn in a Bollywood movie

### **Adjacencies**

Adjacent means 'next to'. When a product is placed next to another it is said to be adjacent. Most of the stores would display in adjacencies for upselling. Shirts, trousers, shoes, socks, accessories, undergarments and perfumes would be in a sequence in order of importance for a male customer. These we term as adjacencies.

### **Selling feature of merchandise used in displays**

Any product will sell. But if the details of a product are explained to the customer, it will sell more.

Product feature should include details of its origin, place of manufacture; efficiency and cost. Features of a product will enhance its sale. Features of a product will talk about things which are not visible. Features should be put in the form of signage and correct size stands should be used.

### **Signage**

- Correct stands should be used:
  - A4 acrylic stand for nested table
  - Shelf talkers for shelves
  - Description and benefits talkers
- These signage should give three to five features of the product
- The font that is used should be uniform across the stores
- Signage should be printed only in prescribed format
- To follow printing rules and legal statutory

### **Tags**

- All products should also be tagged so that it gives information to customers
- Tags are silent talkers and help productivity
- Details in the tags should be uniform across the stores—not too much nor too little
- Price tags should be tucked inside the garment
- Security tags should not be prominently visible
- Size labels should be well aligned

In slide 14 we can see the various sign holders which are used in putting up the selling features of merchandise.

## Activity



1. **Objective of the activity:** To help learners to identify the correct adjacencies
2. **Learning outcome:** Learners will be able to identify the correct adjacencies
3. **Procedure:**
  - Divide the participants into groups and show them slide 16
  - Discuss and identify the correct adjacencies and what they mean for
  - Clockwise from left
    - Sippers and air-freshners—Wrong
    - Chips and soft-drinks—Correct
    - Baby needs—Correct
    - Cigarettes and mouth refreshners—Correct
    - Cigarettes and chocolates—Correct
    - Snacks(food items) and sanitary napkins—Wrong
4. **Debrief:** Explain that adjacencies of appropriate products project the image of the store and boost sales

## Summary



- Different types of merchandise groupings done in a display
- Features of symmetrical balance and triangle principle
- Features a focal point within a display
- Concepts of optical centre, rectangular, radial, repetitive, rhythm, group and harmony
- Role of displays in marketing, promotional and sales campaign activities
- How attractive displays aid in achieving add-on sales
- Selling features of merchandise to be used in displays



## UNIT 8.6: Dressing up visual merchandising displays

### Unit Objectives

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

1. Identify the significance of lighting in displaying merchandise
2. List the different types of lights used
3. Identify the methods of lighting used in displays
4. Demonstrate how to use different types, directions and levels of light to create atmosphere
5. Identify the locations in floors and ceilings where display is done
6. Discuss the role of lighting window displays in enhancement of visual effects
7. State the role of Props, prototypes, dressings and fixtures creating visual effects
8. Apply the methods used to dress up mannequins, busts and other props
9. Describe the dressing techniques for different types of merchandise
10. Identify the key elements of merchandise and props on which consultation of merchandiser or buyer is sought

### 8.6.1 Lighting

#### Role of lighting:

Lighting is essential in calling the attention of the buyers towards the merchandise on display. A shopper's eye is drawn automatically to the brightest item or area. Lighting treatment may be used to draw attention to a part of the display area, a specific item in the display or to coordinate parts of the total display area. Lighting can also be used to direct shoppers through the store, attracting them to various displays along the way. Because of this tendency to follow a lighted path, display lights should be two to five times stronger than the lighting in other parts of the store.

Many types of lightings are used in retail displays:

- Track lights: One can find these in the big window displays or designated permanent focal points
- Pendant lights: These are dome type lighting which focusses on certain areas
- Light bulbs: Normal bulbs with reflective shades
- Mini track: When putting up a display in a permanent window, the mini track is used to focus and create secondary lighting and sometimes it is used for atmosphere lighting
- Exhibit lights: Bulbs which have high luminence
- Dressing room lights: Normal bulbs which do not generate heat

#### Methods of using lighting

There are three methods of lighting:

- Primary lighting: When the display is lit and merchandise is seen, we call it as primary lighting
- Accent or secondary lighting: When a specific place is to be lit and highlighted we call it accent or secondary lighting
- Atmosphere lighting: This is important because this clears shadows of the merchandise that would be formed because of primary or secondary lighting

- Use more light for dark colours, less light for light colours
- Beam spread techniques:
  - Floodlighting: Recessed ceiling lights to direct light over an entire wide display area
  - Spotlighting: Focusses attention on specific areas or targeted items of merchandise
  - Pinpointing: Focusses a narrow beam of light on a specific item

#### **Different directions and levels of light to create atmosphere**

- Directions of light depends on the display size, height, length and width
- Depends also on the location and layout of where and how it is placed. If it is facing an open area there could be natural light coming in during day-time and a different type of lighting direction would be required during the night
- Levels of light can be controlled by luminosity and the brightness of the type of bulb/lights to be used. Depth of light matters a lot here

#### **Suggestions for using light effectively include:**

- Increase display light when visual detail is important
- Create a buying mood by using various amounts of lights for manipulating light and shadow
- Save the brightest lights for the merchandise and avoid anything that will distract from the merchandise. For example avoid bright, white lights directly on a mannequin's face, elbows or shoes
- Bring out the tempting colours of meats, fruits and vegetables by using fluorescent lamps rich in red energy, including the deluxe cool white type. Cool reflector incandescent lamps may also be used for direct-type lighting
- On sunny days, provide contrast to the natural light by using more light in window displays

### **Floor and ceiling**

#### **Ceilings**

- They add beauty to the ambience of the store and are based on a design where the lighting would be concealed
- Shapes of the ceiling would also vary taking into consideration the acoustics of the store and echoing
- Lit ceilings also help enhance the look of the store while brightening up the merchandise on floor

#### **Floor**

The type of flooring will differ from department to department:

- Wooden flooring will be seen where leather goods and accessories are displayed
- Vinyl flooring will help boost small accessories section; in sports section either vinyl flooring or wooden flooring will be used
- Polished flooring can be seen where formal apparels and high end merchandise are sold
- Some visual merchandisers even use the floor to put up vinyl stickers in the form of foot prints These would lead the customer from entrance to the products

### Window displays in enhancement of visual effects

Window displays are critical and reflects the organisation's health.

- Windows help customer to locate the product they are looking for
- Windows carry a theme which always reflect the mood and the festivity of the society
- It helps in projecting the health of the organisation. A well prepared window reflects the prosperity of the store
- A vibrant window attracts a customer. The customer is made to believe that inside of the store will be as vibrant as the exterior. Windows add colour to the store

There are different methos of window display as seen hereunder:

- Ramped windows: Floor is higher in the back than in front
- Elevated windows: From 1 to 3 feet higher than sidewalk
- Shadowbox windows: Small, box-like display windows
- Semi-closed windows: Partial background that shuts out some of the store interior from those viewing the window
- Open windows: Have no background panel and the entire store is visible to people walking by
- Island windows: Four-sided display windows that stand alone, often in lobbies

### Role of props

Props can be defined as the objects added to support the theme of the display. Various types of props used in a display:

- Functional props: Used to physically support the merchandise (mannequins, stands, panels, screens, etc.)
- Decorative props: Used to establish a mood or an attractive setting for the merchandise being featured (for example mirrors, flowers, seashells, surfboards, etc.)
- Structural props: Used to support functional and decorative props and change the physical makeup of displays (boxes, rods, stands, stairways, etc.)

### Role of props, prototypes, dressings and fixtures

#### Props

- The interest created by the product displayed with props is far higher that the one without any props
- A mannequin is a prop; it showcases how an apparel will look when worn
- The prop also helps customer to visualise the utility of the product and makes the decision making easy. For example when displaying a rugged jeans, use ankle high shoes, a Mexican cap and lengths of thick rope depicting the cowboy profile. The ankle high shoes, cap and rope are the props

#### Prototype

- When a display is received with the design brief, there will be a picture of the display. This is called the prototype. This would be sent to the stores to ensure that there is uniformity of display across the length and breadth of the country

- The window dressings helps the customer to know about the current trends that is the style, colour and occasion. This directly helps enhance the sales. The backdrop, the podium cloth which will be blending with the back drop enhances the look of the product. The graphics or pictures used would relate the product with the current period, for example in the month of January, stores across Gujarat will have kites in their display to prompt the customer about the ensuing 'Uttarayan' festival

### Fixtures

- Fixtures used in certain displays also help enhance visual effects. When a watch is displayed in a clear acrylic stand, our attention is only on the watch and not on the acrylic stand. Similarly the fixture should be less vibrant so that it does not overshadow the product

### Mannequins—type of prop

Various types of mannequins are used as props to display different products:

- Realistic mannequins
- Tailor dummies
- Display forms
- Abstract mannequins
- Headless mannequins

The images portray the type of mannequins used as props in the display. Each and every type forms eloquent way of dressing it up. Manufacturers' instruction must be followed while dressing up the mannequins along with the design brief, theme, colors, texture, lighting, etc.

### Dressing up mannequins, busts and other props

Dressing up a mannequin and busts is not as easy as it may sound.

- There are different types of mannequins—male, female, child, with head, without head and with limbs' moving and fixed
- There are different colours of mannequin—white, beige, brown and black
- From the design plan, get to know what type of mannequin is required and ensure that the enamles are in good shape and not chipped off
- Get the pins, staplers and other accessories required before dressing it up
- Do not dress up the mannequin in public. The show window is to be covered or dressing should be done in the back room
- Identify the mannequin which will suit the purpose and requirements of the display
- Not all limbs of the mannequin are removable. Remove detachable limbs and dress the mannequin. Once this is done, slip the limbs through the apparel
- Fix the detached limb in its place
- Accesorise the display
- Depending on the event, the mannequin's hair-do can be decided, if required
- Some visual merchandisers have started tattooing mannequins, painting them with different colours and some have done even body painting—a total shift from the tradition

### Consultation with merchandise or buyer

Like the five elements in universe, there are elements which are very critical for a successful display. The display cannot be changed at the store level as this might disturb the balance.

Elements of merchandise and props may be classified as under:

- **Product:** What type of product and what is the impact it is going to make on the overall business?
- **Position:** Who is the target customer? Do we have them coming to the store? What percentage of our customers are they? Will the display make the stopper a shopper?
- **Prop:** How well it gels with the parent product? What is it that the prop communicates? Does it communicate the message that we want through the design plan?
- **Promotion:** Do we have promotions for the product(s) which are on display? How much sales is it going to bring in?
- **Results:** Are the expected results achieved? What were the strong points and what were the shortcomings?

### Activity

1. **Objective of the activity:** To help learners identify the different types of lighting used in a display
2. **Learning outcome:** Learners will be able to identify the different types of lighting used in a display
3. **Procedure:**
  - Divide the participants into groups
  - Learners to list the different types of lights used in the stores by recollecting from their memories of store visits
  - Learners to list the advantages and benefits of usage of lightings in setting up displays
4. **Debrief:** Summarise the discussion by stating the advantages and benefits of lighting in setting up the visual merchandising displays

### Activity

1. **Objective of the activity:** To enable learners to identify the usage of different props used in setting up visual merchandising displays
2. **Learning outcome:** Learners will be able to identify the usage of different props used in setting up visual merchandising displays
3. **Procedure:**
  - Divide the class into groups
  - Ask learners to list the different types of props they have seen during their visits to the stores
  - Ask them to state the purpose of each prop and the way they were dressed
  - Ask them to state the impact achieved by the dressed up prop
  - Ask them to state how props help in promoting the sales at the store
4. **Debrief:** Summarise the discussion by emphasising on listing the different props used in the store and how the visual effects help in promoting the sale at the stores

## Summary

- Role of lighting in displaying merchandise
- Different types of lights used
- Methods of lighting used in displays
- How to use different types, directions and levels of light to create atmosphere
- Locations in floors and ceilings where display is done
- Role of lighting window displays in enhancement of visual effects
- Role of props, prototypes, dressings and fixtures creating visual effects
- Methods used to dress up mannequins, busts and other props
- Dressing techniques for different types of merchandise
- Key elements of merchandise and props on which consultation of merchandiser or buyer is sought

## UNIT 8.7: Health and safety in displays

### Unit Objectives

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

1. List the key health and safety guidelines for displays
2. List the safety measures to be taken when putting products together for sale
3. Identify the dangers and risks to health, safety and security in relation to storage facilities and stored items
4. Outline the process of reporting dangers and risks to the concerned
5. Describe the techniques for cleaning display sites and parts safely and thoroughly
6. Identify safe and approved cleaning materials and equipment to use

### 8.7.1 Health and Safety Guidelines for Displays

Health and safety had been secondary in India till a couple of decades back; however things have changed now with more and more of customer awareness. It is now imperative for all stores to take care of health and safety in the store.

- Ensure that any display is in compliance with the local regulations
- Do not display products which are close to expiry or expired products
- If you are displaying short life products, ensure that they are changed frequently
- Do not mix food and non-food articles in the same display to avoid cross contamination
- When displaying fresh food, ensure that they are properly cling wrapped with the date of packing and expiry clearly mentioned in the label

#### **Safety measures when putting products together for sale**

When displaying, ensure that proper measures are taken for the safety of the staff and customers. While arranging a display on the racks, ensure that products are handy and the staff are using only one carton for working. Too many cartons kept open while working can lead to risks of falling when reaching to them.

While cutting/opening packed boxes:

- Use a box cutter with a proper handle
- Check the thickness of the cardboard
- Thin cartons require less pressure to cut and caution should be taken not to damage the contents with the box cutter
- Place one hand on the box and use the other hand to firmly hold the box cutter
- Begin by cutting with the box cutter blade angled slightly upward and away from the merchandise
- Cut the box, away from your body and as close to the top of the box as possible
- With each cut, be sure body parts and clothing are not in the path of the box cutter
- Safely dispose unwanted material after unpacking
- Follow packing procedures as per company policies and procedures when certain stock has to be returned to vendor, DC or other stores

#### While lifting heavy objects:

- Keep your feet wide enough, equal to shoulder-width apart, with one foot slightly ahead of the other
- Squat down, bending at the hips and knees only. If necessary, keep one knee on the floor and the other knee in front of you, i.e. half kneeling
- Look straight ahead, and keep your back straight, your chest out and your shoulders back. This helps keep your upper back straight while maintaining a slight arch in your lower back avoiding any kind of a back strain
- Slowly lift by straightening your hips and knees (not your back). Keep your back straight, and do not twist or turn as you lift
- Hold the load as close to your body as possible, at the level of mid stomach
- Decide your route plan in advance and use your feet to move in the direction where you have to take the load by taking small steps
- Lead with your hips as you change direction. Keep your shoulders in line with your hips as you move
- Set down your load carefully, squatting with the knees and hips only
- Never lift a heavy object above shoulder level
- Avoid turning or twisting your body while lifting or holding a heavy object

#### While using a ladder:

- Ensure the ladder is free from rust and is not broken
- Rest the ladder against a surface which has proper grip. Make sure it does not slip
- Hold both the sides and climb one step at a time
- Complete your task at chest level
- Do not hold with one hand
- Leave the first two steps of the ladder free always
- Ensure that both the legs are firm on the floor and someone is in attendance
- Use appropriate step ladder or steps while displaying product at a height

#### Keep in mind:

- Do not stand on a trolley to reach heights
- If using pallets as a podium to reach levels, ground the pallets and do not jack it up with a pallet mover
- If need be, barricade the surrounding as a safety measure for avoiding customers walking in
- If floor is slippery ensure that proper signage is put cautioning the customer

#### **Dangers and risks to health, safety and security during storage**

- Products should be stored in their designated area only
- Storage of products should be planned in such a way that there is no cross contamination
- Products that are kept at a higher level should be cling wrapped or strapped to avoid falling down
- Timely and effective pest control activities should be done to avoid any health hazard
- All damaged and expired products which are retrieved from floor should be kept in a secluded area labelled 'Not for sale'



- High risks articles should always be kept under lock and key in the storage area and should be issued in the presence of security only
- Access control to storage facilities should be only for limited employees with a signature register for entering in and out with materials taken or returned

### Dangers and risks and reporting them

Repeated audit of storage area is to be done and any 'alien' product should be reported to the supervisor. Record the incident as per report format/process.

- Food articles and non-food articles have to be checked and ensured that they are placed in their respective places only. This would be possible with audits
- Check that pallets which are kept high in the storage area, are propely cling wrapped or bound with bands. Else report it immediately to the Goods receipt manager and the supervisor
- Look out for rodent traces in the storage area. Any trace will reflect ineffective pest control. Report to your supervisor for remedy and help
- Damages and expired products should be kept only in the designated area. Ensure that products of these nature are not left elsewhere
- Check for high risk article cupboards or cages that they are locked and sealed. In case of any anomaly, report to your supervisor immediately
- For all practical purpose, your supervisor is the immediate person to whom you can report

### Reporting risk/danger sample form

<b>Danger/Risk Report Form - Example</b>	
Name:	Date:
Location:	
Equipment:	
Description of the Danger/Risk:	
Suggested corrective action:	
Signature:	
Supervisor's remarks:	
Corrective action taken:	
Signature of Supervisor:	Date:

*Fig. 8.7.1: Danger/risk report form*

### Techniques for cleaning display sites

Once the display is done, get the supervisor to approve to ensure it is in tact and nothing has disturbed the daily routine in a store. Displays are bound to accumulate dust and dirt and it requires to be cleaned regularly.

- First remove the articles from the display one by one. Remember from where you had removed a product so that it goes back to the same place
- The product detailer and price tickets should be kept with the product
- Vacuum the podium and replace the products and the props. Do not forget to put up the product detailer or price tickets
- Where the display is small, featherette can be used to dust off
- Where there are big metal articles, clean them with 'chamois' leather. This will help the article retain its look and sheen

### Safe and approved cleaning materials

Every organisation has some approved standard chemicals and equipment and are tied up with manufacturers for supplies of the same.

Today there are housekeeping agencies who are approved to work within retail stores. This is because they know how, where and when to clean and what are the right chemicals and equipment to be used. These standards are specified and approved by the government and local health bodies.

- For vacuuming the display, use the small car vacuum machine, else the entire display may tumble
- Use a glass cleaning liquid to clean the window glasses and use tissue paper to wipe it out
- If you have steel frames in the display, clean them with mops dipped and squeezed in diesel. It will retain its sheen and look fresh. There would not be any odour of diesel. This is good to clean off finger prints on the steel frames too
- Featherette may be used where the products are delicate and cannot be disturbed (jewellery or watches)
- Cleaners or disposable detergent wipes
- There are specific cleaners for mirrors and glasses. These will not leave any impression on the surface after cleaning and are not corrosive
- Carpet shampoos/cleaners
- There are different odourless shampoos which are used for cleaning the carpets and chairs in the store
- Floor strippers
- Floor gets coated with wax like dirt due to gum based tapes, etc. These have to be descaled and stripped. If it is to be done manually, it would take lot of time. So certain chemicals are used which will retain the floor without corrosion and descale all the wax on top of it
- Floor polishers
- The lighting in the store should reflect on the floor so that it looks grand. This would be possible only with floor polishing. These would have wax but will not lead to slippery surface
- Floor cleaning and de-scaling chemicals (removing lime)
- Over a period of time, due to rain and moisture, the glazing would have marks of hard water which should be removed. Descaling chemicals are used to clean such surfaces
- Air fresheners/deodorisers

- The display site should have a pleasant fragrance and there should not be any smell anywhere. Mild air fresheners will be used, so that people are not affected with the odour to which they might be allergic to
- Use a soft brush
- Do not use corrosive chemicals. Only dry cloth is required to clean the display
- Use featherettes which are clean and firm, so that they do not disturb the display
- Use limited quantity of diesel to clean the steel frames
- When cleaning the glazing, use proper step or stool which is firm on the ground. After spraying a glass cleaning liquid, clean it with tissue paper and not newspaper. If not cleaned properly, it will leave a black trace and also attract dust
- Use small blowers as in watches to clean displays which are very intricate
- When cleaning functional displays of CDIT, ensure that the systems are switched off before you start cleaning them. Once the cleaning is done, ensure that you have switched them on
- Do not use water or any solution when cleaning the displays of CDIT articles

### Safe and approved cleaning equipment

Each organisation has its own set of approved brand/s of equipment used for cleaning. Some of the sample cleaning equipment used to clean the display site are given below:

- Dry mop (broom)
- Wet mop
- Sponge mop
- Vacuum cleaner
- Mobile wet mop machine to clean larger surface areas on the floor, if required
- Safety cones and signs

## Activity

1. **Objective of the activity:** To identify health and safety risks and report the same to the concerned authority
2. **Learning outcome:** Learners will be able to identify health and safety risks and report the same to the concerned authority
3. **Nature of activity:** Group
4. **Procedure:**
  - Divide the class into 2–3 teams
  - Read the scenario given below
  - Participants to identify the potential risk/danger involved and how to eliminate them by solving or reporting
5. **Scenario:**
  - The following has been noticed in the store:
  - Heavy items stacked without shrink-wrap in the storage area exceeding the specified load limit. For example, a wooden pallet can carry up to 550kg of load
  - A pack of bread has been found along with a washing powder packet
6. **Debrief:** Summarise the potential risks and danger involved in the above two cases. Also outline the reporting format

## Summary

- Key health and safety guidelines for displays
- Safety measures to be taken when putting products together for sale
- Dangers and risks to health, safety and security in relation to storage facilities and stored items
- Process of reporting dangers and risks to the concerned
- Techniques for cleaning display sites and parts safely and thoroughly
- Safe and approved cleaning materials and equipment to use

## Exercise

Answer the following questions by choosing the correct option:

1. \_\_\_\_\_ are followed very systematically in all department stores.
  - a. Colour blocks
  - b. Colour selection
  - c. Colour offering
  - d. None of the above
  
2. \_\_\_\_\_ the seven colours of rainbow help us in colour blocking.
  - a. VBGIYRO
  - b. VIBGYOR
  - c. VIGBRYO
  - d. None of the above
  
3. The \_\_\_\_\_ will also have details of an end picture for guidance.
  - a. designing brief
  - b. display
  
4. \_\_\_\_\_ should always be done such that both the halves are balanced.
  - a. Triangle principle
  - b. Focal points
  - c. Fixturing
  - d. None of the above
  
5. In a display when there is focus on a product and then it leads to other products displayed which are subordinates, then we say the display is grouped in \_\_\_\_\_.
  - a. rhythm
  - b. harmony
  - c. optical centre
  - d. emphasis

Answer the following:

1. What are the roles of display in marketing, promotional, sales campaign and activities?
2. What stands to be the role of lighting in a retail store?
3. What are the various types of mannequins?
4. What are the elements of merchandise and props that might be classified?
5. What are the safety measures when putting products together for sale?





## 9. Employability Skills











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## 10. Annexure



Module No.	Unit No.	Topic Name	Page No	Link for QR Code (s)	QR code (s)
1 - Introduction to Retail	Unit 1.1 - Introduction to Retail	1.1.1 Retail	19	<a href="http://www.youtube.com/watch?v=Gm-agMs-fu0s&amp;t=40s">www.youtube.com/watch?v=Gm-agMs-fu0s&amp;t=40s</a>	 <p>English phrases for sales person</p>
	UNIT 1.3: Retail Formats	1.3.1 Retail Format	19	<a href="https://www.youtube.com/watch?v=xOkRogadXqk">https://www.youtube.com/watch?v=xOkRogadXqk</a>	 <p>Types of Retail Formats</p>
2 - Setting up Product Displays	Unit 2.1 - Displaying Products on the Shelf	2.1.1 Role of a Trainee Associate in arranging the deliveries of merchandise for display	34	<a href="http://www.youtube.com/watch?v=xGCLzclR7E">www.youtube.com/watch?v=xGCLzclR7E</a>	 <p>What is point of sale display</p>
3 - Preparing Products for Sale	Unit 3.3: Planogram	3.3.1 Planogram	63	<a href="https://www.youtube.com/watch?v=Zq0nEkrJ5rg">https://www.youtube.com/watch?v=Zq0nEkrJ5rg</a>	 <p>What is a planogram</p>
	Unit 3.4 - Putting Products for Sale	3.4.1 Methods to identify the products to prepare for the sale	63	<a href="http://www.youtube.com/watch?v=IQsbFaNZLm4">www.youtube.com/watch?v=IQsbFaNZLm4</a>	 <p>How to make sales effective</p>
	Unit 3.4 - Putting Products for Sale	3.4.1 Methods to identify the products to prepare for the sale	63	<a href="http://www.youtube.com/watch?v=FXHD4VPWkrk">www.youtube.com/watch?v=FXHD4VPWkrk</a>	 <p>How to be a successful sales person</p>

Module No.	Unit No.	Topic Name	Page No	Link for QR Code (s)	QR code (s)
	Unit 3.4 - Putting Products for Sale	3.4.1 Methods to identify the products to prepare for the sale	63	<a href="http://www.youtube.com/watch?v=-JT1bc8q5Dw0">www.youtube.com/watch?v=-JT1bc8q5Dw0</a>	 How to upsell
4 - Provide Information to Customers	Unit 4.1 - Qualities Required of a Trainee Associate and Various Customer Styles	4.1.1 Customer styles—Defensive	72	<a href="http://www.youtube.com/watch?v=rt6QXdKafRQ&amp;t=46s">www.youtube.com/watch?v=rt6QXdKafRQ&amp;t=46s</a>	 How to greet customers
5 - Resolving Customer Complaints	Unit 5.1 - Customer Complaint Handling Process	5.1.1 Service	86	<a href="http://www.youtube.com/watch?v=zldwm__fnEc">www.youtube.com/watch?v=zldwm__fnEc</a>	 How to deal with aggressive customers
	Unit 5.1 - Customer Complaint Handling Process	5.1.1 Service	86	<a href="http://www.youtube.com/watch?v=LVTZ_jISqH4">www.youtube.com/watch?v=LVTZ_jISqH4</a>	 How to retain customer
	Unit 5.1 - Customer Complaint Handling Process	5.1.1 Service	86	<a href="http://www.bakercommunications.com/sales-training-videos.htm">www.bakercommunications.com/sales-training-videos.htm</a>	 Sales Training

Module No.	Unit No.	Topic Name	Page No	Link for QR Code (s)	QR code (s)
8 - Visual Merchandising	Unit 8.1 - Introduction to Visual Merchandising	8.1.1 Visual Merchandising	154	<a href="https://www.youtube.com/watch?v=6edj2Vvz3OU">https://www.youtube.com/watch?v=6edj2Vvz3OU</a>	 What is Visual merchandising
	Unit 8.2 - Introduction to visual merchandising displays	8.2.1 Methods of Designing Displays for Different Types of Merchandise	154	<a href="https://www.youtube.com/watch?v=-d5jx5pwMdg">https://www.youtube.com/watch?v=-d5jx5pwMdg</a>	 Merchandising principles
	Unit 8.3 - Planning visual merchandising displays	8.3.1 Different Purposes of Displays and Their Use in Visual Merchandising	154	<a href="https://www.youtube.com/watch?v=2DhQ35Uj2Y">https://www.youtube.com/watch?v=2DhQ35Uj2Y</a>	 Merchandising themes

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