Retail

A partnership project of Prince Edward Learning Centre and Literacy Link Eastern Ontario

Funded by the National Literacy Secretariat (HRSDC) and the East Central Ontario Training Board
Prepare to work in the Retail Industry

This program is ideal for anyone planning to work at a retail business such as a grocery or clothing store. This 7-module course explores the Essential Skills required to work successfully in this field.

Modules of study include:

1. What does it mean to be a retail associate?
   - Introduction to Retail Essential Skills Training
   - Overview of the World of Retail
   - Attitude and Appearance
   - Team Work
   - Communication Skills

2. Customer Service
   - Commitment to Customer Service - Part 1
   - Commitment to Customer Service - Part 2
   - Telephone Service
   - The Upset Customer

3. Tools of the Trade
   - Introduction
   - Calculators
   - The Cash Register
   - Computer Basics

4. Store Procedures
   - Common Work Tasks
   - Store Maintenance
   - Schedules, Payroll, and Other Forms
   - Store Policies and Procedures

5. Retail Math
   - Money Math
   - Cash, Cheques, and Debit Cards

6. Health and Safety
   - Your Rights
Acknowledgements

Retail Essential Skills Training

Literacy Link Eastern Ontario (LLEO) and Prince Edward Learning Centre (PELC) thank the many people who assisted with the development of this training product. We also thank the learners and staff who provided valuable feedback throughout the development of this product.

Other Acknowledgements

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Retail Essential Skills Training

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LLEO and PELC gratefully acknowledge the National Literacy Secretariat (HRSDC) for funding this Workplace Literacy Special Initiative project. The groups also wish to thank the East Central Ontario Training Board for its financial contribution to the project.
Introduction

Retail Associate: A General Description

The main responsibility of a retail associate is to sell, rent, or lease a product or service to a consumer. Helping customers find what they are looking for is a large part of the selling process in any retail business. The retail associate may be selling anything from shoes, to wallpaper, to computer equipment. To be successful as a retail associate, it is important that the associate is able to accurately describe a product’s features, demonstrate its use, and show the styles and options available. Every detail of a retail associate’s job is about selling the product!

Friendly, sincere and enthusiastic customer service is a very important skill in any retail position. Consumers spend millions of dollars every day on merchandise. Often, feelings a customer has about a store are formed by the dealings the customer has with the staff. This is why acting in a professional way and providing sincere and helpful customer service are such important skills to have as a retail associate. For example, if a customer wants a particular product which is not available on the sales floor, a successful retail associate would offer to check the back stock room, call a partner store, or place a special order for that customer.

When an associate offers thoughtful service and the “extras”, the customer is happy. Customers remember retail associates – the impression you give will shape how the customer sees your store. Providing a customer with help to find what they need is the main responsibility of a retail associate. This is how repeat customers are won. One of the most rewarding feelings you will get as a new retail associate will be when you see a familiar face returning for your specific knowledge and help!

A retail associate is responsible for much more than selling to customers. Multi-tasking is a skill that retail associates need to do all the time. For example, you need to be able to talk with the customer while you are entering their purchases, or you may need to answer a question your
co-worker is asking while you are making change. Working in a retail store involves certain skills. An associate needs to be able to manage time wisely, even with many interruptions by customers and other staff. An associate who can be counted on and who can handle changes during the workday has powerful skills that are important in any retail job.

**Multi-tasking:**

- the ability to do more than one thing at the same time
- the ability to pay attention to more than one thing at the same time

Many things can affect the tasks a retail associate will be asked to do. Working in a small independent store may have different duties from the tasks you are asked to do in a large company. Christmas holiday season or before school begins in the fall may mean more work for you at these times. If you are a bookseller, your skills and knowledge about the product will be different than if you sell automobiles. All of these different situations, and much more, will have a big influence on the specific duties which you, as a retail associate, will be responsible for on any given day, week, or month!

A retail associate needs to have some or all of the following skills:

- Customer service
- Decision-making
- Looking and acting professionally
- Oral communication
- Organization
- Multi-tasking
- Problem-solving
- Time management
- Use of technology
- Working in a team setting
- Working independently in a structured environment
A typical retail associate’s day will involve some or all of the following tasks:

- Cashier duties
- Cleaning and maintaining the store
- Handling returns and exchanges
- Mailing or delivering orders
- Marking price tags up or down
- Merchandising
- Keeping track of inventory
- Opening and closing procedures
- Packaging purchases
- Stocking shelves or racks
- Knowledge of store incentive programs or sales initiatives
- Providing telephone service
- Bank deposits and coin orders
- Following safety precautions
- Being informed about the company

Training and Qualifications to Become a Retail Associate

Some employers ask for a high school diploma or equivalent, but this is not always needed to land that job! Most importantly, employers look for people who are able to work well with others, are friendly and upbeat, can work on their own in a structured environment, have a strong work ethic and a positive attitude, have a neat and tidy appearance, are able to communicate well with others, and are curious and eager to learn!

The training an associate receives in a new retail position depends on the size of the retail operation where you work. If, for example, you begin working in a small health food store, your training will be fairly short. Training will likely involve a couple of shifts either working together with the owner of the store or an experienced associate to understand how to use the cash register, how products are merchandised, how the back room is organized, etc.
After a couple of days of watching how things are done and some hands-on practice, the owner may decide you are ready to dive right into the job! During this time, it is important to ask questions about parts of the job you may not be certain of or need further training in. Most employers can tell when they have an eager and enthusiastic new employee and will appreciate your efforts to learn all about your new job. Never be afraid to ask questions because you will continue to learn every day on the job.

If, on the other hand, you begin working in a large retail operation, the training program will be more formal and will be for a longer period of time. You will learn about customer service, safety and security issues, store policies and procedures, cash register operations, opening and closing duties, and more. The training program may involve videos and tests, depending on the company you work for.

Depending on the product you are selling, you may be required to attend additional training provided by the company who makes the product. For example, a cosmetic salesperson will need training about the types of products the store carries and will need to understand which customer would benefit most from which product. An automobile salesperson would need to receive further training about the technical details of the standard and optional equipment available on new models. In larger companies, employers will often provide additional training for retail associates to update and refine their skills.

The following seven modules will give you an introduction to the most important parts of a retail associate position and the skills necessary to the job. Once you have finished the retail essential skills training, you will receive a certificate that will recognize your accomplishments. Be sure to add this certificate to your portfolio.

The six modules covered are What Does It Mean To Be A Retail Associate?, Customer Service, Retail Math, Tools of the Trade, Store Procedures, Health and Safety and Wrapping It Up! There are different learning activities in each module that will let you work through what you are learning. These
activities are your chance to show off what you have learned, and should be kept for your **portfolio**. You are asked to write in complete sentences and check for correct spelling and grammar. This is what is expected of you when you are on the job!

**Portfolio:**

- usually a binder where you keep examples of your work, volunteer, and training experience
- a collection of things you are proud of having accomplished that future employers would be interested in seeing

The following pages are your Record Sheets. These give you a breakdown of each module and the sections that will be covered in that module. It will be used as your tracking sheet to make note of your completion dates and marks. **You must receive a final grade of 80% or more to pass.** The following pages are your first learning activity.

Good luck and let’s begin!
Retail Essential Skills Training Student Record

Module 1: **What Does It Mean To Be A Retail Associate?**

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<tr>
<th>Unit</th>
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<tbody>
<tr>
<td>Introduction</td>
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<tr>
<td>Overview Of The World Of Retail</td>
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<tr>
<td>Attitude And Appearance</td>
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<td>Team Work</td>
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<td>Communication Skills</td>
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Module 2: **Customer Service**

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<td>Commitment To Customer Service – Part 1</td>
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<td>Commitment To Customer Service – Part 2</td>
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<td>Telephone Service</td>
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Module 3: **Tools of the Trade**

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<td>Calculators</td>
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<td>Cash Registers</td>
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<td>Computer Basics</td>
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Module 4: **Store Procedures**

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<td>Common Work Tasks</td>
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<tr>
<td>Store Maintenance</td>
<td>14 – 21</td>
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<tr>
<td>Schedules, Payroll, and Other Forms</td>
<td>22 – 32</td>
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<tr>
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Module 5: **Retail Math**

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<td>Money Math</td>
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<td>Cash, Cheques, Credit and Debit Cards</td>
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Module 6: **Health and Safety**

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Module 7: **Wrapping It Up!**

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<td>Personal Plan</td>
<td>1 – 10</td>
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Learning Activity #1

Please write in complete sentences and check for correct spelling and grammar!

1. What are examples of retail associate positions?

2. What are three skills you think are the most important for a retail position? Choose one skill from the three, and describe why you think it is so important.

3. What are three tasks you think will be most important in a retail position? Choose one task and describe why you think it is so important.
4. What are some retail positions where you could see yourself working?


5. Match the words or phrases below to the description that matches best.

a. _____ Positive Body Language
b. _____ Communication Skills
c. _____ Personal Hygiene
d. _____ Customer Service
e. _____ Time Management
f. _____ Dress Code
g. _____ Appearance
h. _____ Attitude

1. Personal cleanliness
2. Connecting either verbally or non-verbally, e.g. a greeting or smile
3. An opinion or way of thinking, e.g. being positive
4. How a person appears to others, an impression or image
5. Body movements that send a positive message, e.g. nodding or smiling
6. Effectively organizing one’s time
7. The appropriate style of clothing for a specific place of work, e.g. trousers and a jacket
8. Providing goods and services in a way that exceeds the customer’s expectations
6. Do you think that most retail people do their job well? Explain why or why not with three reasons to support your answer.

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7. Think of a situation where you thought, “Gee, that person is a really great salesperson.” What made her/him so great?

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8. What parts of the retail essential skills training are you most interested in learning more about? Explain why.

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Overview of the World of Retail

Employers

Employers come in all shapes and sizes. Retail is not a one-size-fits-all business. According to an article at www.possibilitiesproject.com, the retail sales industry depends on a good economy and right now there is plenty of opportunity to work part-time in the field. Most employees are women. The wages are just under $30,000 for full-time employees. Many retail organizations offer promotions to their front-line staff, because they realize these employees have learned the basics of the operation.

Retail sales opportunities can be found in large or small operations. A retail operation can be a kiosk in a mall, a department store chain, a franchise operation, a dollar store, or a specialty store. The products sold are too numerous to list. Pricing can also define a retail operation, for example discount stores, high-end stores, or low-end stores.

Slogans

Companies use slogans in order to build recognition. There are a number of companies that have slogans people recognize right away. Often a slogan appeals to a lifestyle we already have or want to have. Slogans are short statements that tell us about the company, the products they sell, and how they do business.

Slogan:
- a motto or phrase that a company feels speaks for its products and/or services.
Slogans are often included in job postings, so understanding the message could help you in your interview. It is important to know if the company you want to work for has a slogan. Why? It gives you important information about the company. Whatever the slogan talks about is something the company values. It could refer to something like quality, customer service, or innovation.

**Learning Activity #2**

Please write in complete sentences and check for correct spelling and grammar!

1. Match the type of business with the best description.

   a. ___ Kiosk
   
   b. ___ Department store
   
   c. ___ Franchise
   
   d. ___ Specialty store
   
   e. ___ Retail operation
   
   f. ___ Discount store

   1. Goods are priced at less than the retail price. Usually considered a low-end store.
   
   2. Is any business that sells to the public at retail prices.
   
   3. Carries a wide range of goods in several departments. The goods are usually mid-range in quality and price.
   
   4. Is a very small retail operation usually found in the centre areas of shopping centres. They often look like wagons and can be easily moved.
   
   5. Is owned by an individual but products and marketing are done by the original company. Pizza Pizza is one.
   
   6. Offers items that are one type. A store could offer sports equipment or plus-sized women’s clothing.
Module: What Does It Mean To Be A Retail Associate?  
Unit: Overview of the World of Retail


2. Give a real example for each of the types of retail operations listed in Question #1. Think about what you have seen in your community.

3. Match the slogans below to the companies in the box on the right. Even if the slogans are new to you, try to match them up with a company on the right. If you are not sure what these companies sell, consult the Yellow Pages, the Internet, a newspaper, or your classmates.

1. ___ Help is close to home.
   a) Walmart
   b) Reitmans
   c) Future Shop
   d) Home Hardware
   e) IGA
   f) Sears
   g) Payless Shoes
2. ___ Your hometown proud supermarket.
4. ___ For the many sides of you.
5. ___ You’ll like what the future has in store.
7. ___ Always low prices.
4. When you were not sure about which slogan matched a company, what was it about a slogan that made you think it belonged to a particular company?

5. Work with a partner and decide what you think the slogans from Question #3 are telling us. Work on your own if there is no one you can do this with.

For example: You’ll like what the future has in store uses the word future to remind us that is the name of the store. It also hints at the product…future meaning technology, in this case. This is one opinion. Do you agree? Does it mean something different to you? There are no right or wrong answers.

Slogans appeal to potential customers for different reasons…envy, lifestyle, fun, and safety, to name a few. Complete the following sentences.

6. In our/my opinion Sears chose the slogan _________________________ because
7. In our/my opinion Home Hardware chose the slogan ___________________________ because ___________________________.

8. In our/my opinion Payless Shoes chose the slogan ___________________________ because ___________________________.

9. In our/my opinion IGA chose the slogan ___________________________ because ___________________________.

10. Now, go to the Internet and find three other retail stores that have slogans. Use a search engine such as Google or Yahoo. List the slogan and the company name below.

   a. ___________________________ __________
   b. ___________________________ __________
   c. ___________________________ __________
Working Conditions in Retail

Full-time retail sales associates usually work a five-day or about a 40-hour week. They may also work weekends or evenings depending on the store hours. Many sales staff work a variety of shifts and many work part-time. Evening, weekend, and holiday work is normal. Full-time retail sales associates usually work set shifts, while part-time staff must agree to work different shifts, including evenings and weekends.

Working conditions are generally pleasant, usually indoors, and in attractive surroundings. Retail associates stand and walk around for long periods of time. They meet a lot of different people. Sometimes they wear uniforms or nametags, or both. Sales associates in stores that sell make-up, jewellery, and clothes are often required to wear the store’s products. They are usually given a discount on purchases in the store.

Some sales associates specialize in a particular product. The working conditions remain the same, but they also need technical or product knowledge to a larger extent. For example, a computer salesperson needs to be able to answer technical questions about computers and accessories.

One of the key things to remember about working in retail is the selling process. In some companies, there is great pressure to meet sales quotas. If your job depends on commission as all or part of your income, you may feel you are competing with your co-workers for sales. Often co-workers are competing for the same customers. Many operations set a target for sales to be reached within a day, a week, a month, or a year. Retail job performance is usually measured in terms of sales.

**Quota:**

- share to be contributed
- number of goods sold or sales to be reached in a certain time period
Learning Activity #3

1. List five positive and five negative things about working in retail. Remember that only some retail positions work on commission. Many positions are hourly or salary based.

<table>
<thead>
<tr>
<th>Positive…Pros</th>
<th>Negative…Cons</th>
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2. What are the differences between these methods of payment? If you are unsure, look in the dictionary or on the Internet, and write the meanings here.

a. Hourly Wage:
b. Salary:


c. Commission:


3. Find out the wages offered in retail positions. Look at job ads in your local paper, search other online newspapers and the Human Resources and Skills Development Canada website. Find six different job positions and fill out the chart below.

<table>
<thead>
<tr>
<th>Job Position</th>
<th>Wage</th>
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</tbody>
</table>
4. Match the job titles below with the appropriate task in the box.

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Task</th>
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</thead>
<tbody>
<tr>
<td>Promotion and marketing staff</td>
<td>1. handles all customer returns and exchanges</td>
</tr>
<tr>
<td>Sales associate</td>
<td>2. responsible for maintaining customers satisfaction</td>
</tr>
<tr>
<td>Customer service associate</td>
<td>3. seeks out and purchases goods for retail operations</td>
</tr>
<tr>
<td>Special services associates</td>
<td>4. sells directly to the customer</td>
</tr>
<tr>
<td>Department manager</td>
<td>5. supervisory position, responsible for all areas of one department</td>
</tr>
<tr>
<td>Buyer</td>
<td>6. responsible for all special orders</td>
</tr>
<tr>
<td>Returns desk associate</td>
<td>7. handles money transactions</td>
</tr>
<tr>
<td>Cashier</td>
<td>8. thinks up ways of bringing the company to the attention of potential customers</td>
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</table>

Sector Trends: Shift From Goods To Services…

Statistics Canada divides our economy into two major sectors: the production sector and the service sector. The service sector includes wholesale and retail trade, real estate, and vehicle sales. The production sector includes areas such as agriculture, fishing, logging, and manufacturing.

The service sector is growing faster than the production sector. There has been a shift in the economy from one that depends on production to one that is service-driven. This is occurring throughout North America. About 72% of all employed Canadians work in the service sector.

The percentage of sales occupations within the service sector of the economy is listed below:

- Retail 18%
- Business Services 10%
- Wholesale 6%
- Real Estate 3%
- Personal Services 10%

Source: Statistics Canada

Learning Activity #4

Please remember to write in complete sentences and check for correct spelling and grammar!

1. What are the two ways that Statistics Canada divides our economy?
2. Which sector is growing the fastest?

3. What is the percentage of Canadians employed in the service sector?

4. Fill in the blanks in the paragraph below using the following words and terms:

<table>
<thead>
<tr>
<th>shift</th>
<th>service</th>
<th>retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>trend</td>
<td>production</td>
<td>sectors</td>
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Ontario’s economy includes the ______________________ and the ______________________. For example, ______________________ accounts for 18% of all service sector jobs. In general, there has been a ______________________ to a service-driven economy. This ______________________ is happening throughout North America.
Future Trends

Successful companies are good at predicting trends. Maybe they use a crystal ball! These companies usually look at information put together by futurists. Futurists are people who look at things like the number of people in a certain age group, how many people own their home, how much education people have, how many people work in a certain type of job, etc. This information helps them suggest trends. One futurist here in Canada, David Foote, has based his predictions on baby boomers. Baby boomers are people between 40 – 58 years old, and they are the largest group in our population. David Foote believes that as baby boomers get older, their changing needs and lifestyles will have a strong impact on the economy.

Sales professionals use this information to sell goods of all kinds. Baby boomers are a huge customer base. Real estate agents realize that this older group of people may want to downsize to a smaller house or a condominium once their children leave home. Foote also suggests that an aging population will need different kinds of products and they will want increased customer service. A large furniture chain, IKEA, recognizes this trend. When it first opened stores in Canada, many customers were university students or young people moving into their first home. The furniture came in kits. People took the boxes home and put them together. IKEA still sells this way, but they have added two popular services: delivery and assembly. This is a company that knows its market!

Prediction of future trends with the baby boomer population:

- spending more time at home
- an aging population
- wanting time-saving and convenience items
- concern for quality and price
- personal services
- moving from an industrial society to an information society
E-Commerce

E-commerce is a way to buy items on the Internet. E-commerce is a new way for businesses to reach their customers. We can look at products on the Internet, shop for a car, or order that special item. We can use this service 24 hours a day. We can take a virtual tour of retail items offered in our price range and we can do it while still in our pyjamas. We can even arrange for the delivery of a car with our choice of colour and extras.

Will the Internet mean the end of living, breathing salespeople? Does it mean increased opportunities for retailers in world markets? Many companies have an Internet website. They feel it will increase “brand recognition”, customers will appreciate the convenience, and their loyalty to a store in a real mall or on a main street will increase. Canadians do not yet use e-commerce the way Americans do. The prediction is that Canadian consumers will continue to increase on-line purchases every year.

Learning Activity #5

Please remember to write in complete sentences and check for correct spelling and grammar!

1. What are the six trends that are predicted for the future in the Canadian population?

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2. What is e-commerce? Provide one example.

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3. Have you ever bought anything on-line? If not, why didn’t you? If you did, was the experience negative or positive? Provide an explanation.

4. Have you ever purchased anything from a catalogue or mail order? If not, why didn’t you? Was the experience negative or positive? Provide an explanation.

5. In your opinion, what are the differences between purchasing face-to-face and on-line or catalogue sales? Which do you prefer? Explain why?
6. Are there specific stores you go to often? Explain why or why not.

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7. Are there specific products you buy because you know the names? Explain why or why not.

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8. Would you shop on-line, or would you look at the products in the virtual store then go buy them in a real store? Explain why or why not.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
9. Interview two classmates and fill in the chart with her/his answers. Complete both columns with their answers.

<table>
<thead>
<tr>
<th>Interview Questions</th>
<th>Interview #1</th>
<th>Interview #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Where do you prefer to buy groceries?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Where do you prefer to buy clothes?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Where do you prefer to buy furniture?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Name four brand name items you often buy.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Have you ever bought anything on-line?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Will you buy something on-line this year? Why or why not?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. Sales occur everywhere and anywhere. “The marketplace” is a term used to describe the commercial world. The following is a partial list of places where individuals buy goods.

- mom and pop corner store
- mail order
- an outdoor lot
- superstore
- door-to-door
- department store
- flea market
- mall or shopping centre
- Internet
- street corner
- catalogue
- kiosk
- telephone
- office
- markets
- wholesale club
- big box store
- specialty store
- home party
- chain store
- re-sale
- factory outlet

Name two others?

The Sales Relationship

The list of places where sales are made tells us that a transaction can happen anywhere. The relationship between buyer and seller is the important thing. The potential sale is the reason why the sales professional and the customer are together. The physical workplace may be very different. The goods being sold can be cheap or expensive, a large or a small purchase, a practical item or something just for pleasure.
Some goods will need special product knowledge and some sales are more complicated because there are regulations or legal agreements involved in buying and selling. The relationship between a sales associate and the customer is one of the oldest relationships in history. How that relationship is built, what Canadian customers expect, the style of selling used by the salesperson…this is what defines sales occupations.
Working the Season

Many people believe that December is not a good month to look for work. Employment counselors have found just the opposite is true! During the holiday season, there is less competition for a position, and a temporary assignment may turn into a permanent job. Over the holiday season, there is lots of temporary work available. There may be a job you are interested in doing. You’ll have the most success finding work in retail and customer service during this time of year.

Source: www.possibilitiesproject.com

Another Seasonal Opportunity

Like the holiday season described above, summer also brings increased job opportunities. In Canada, winter is long, cold and snowy. It is more difficult to be out driving and shopping. Many people take their vacations in the summer months. Companies need to hire temporary staff to cover regular employees’ holidays.

The market for summer homes or cottages increases in the summer. Recreational items are purchased. Opportunities for sales increase in many categories of sales: gardening, sports equipment, building materials, camping equipment, etc.
Learning Activity #6

Please write in complete sentences and check for correct spelling and grammar!

1. What do you think makes someone a successful sales professional? List at least three qualities.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

2. Look at the chart below. Decide if what is in the column on the left is critical for all retail sales associates to have. Put a yes (✓) or a no (X) in the middle column. In the right column, give a reason to explain your answer.

<table>
<thead>
<tr>
<th>Skills, knowledge, and attributes</th>
<th>Yes / No</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school diploma</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Excellent ability to deal with customers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift of the gab</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product knowledge</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Module: What Does It Mean To Be A Retail Associate?  Unit: Overview of the World of Retail


<table>
<thead>
<tr>
<th>Good communication skills</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Post secondary education</td>
<td></td>
</tr>
<tr>
<td>Math knowledge</td>
<td></td>
</tr>
<tr>
<td>Ability to work with others</td>
<td></td>
</tr>
<tr>
<td>Computer knowledge</td>
<td></td>
</tr>
<tr>
<td>Ability to multi-task</td>
<td></td>
</tr>
</tbody>
</table>

3. Why do you think there are more job opportunities during the holiday season?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. What kinds of behaviour and skills would help you turn a temporary job into a long-term position?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Your Professional Attitude at Work

To be a star in any retail position, you must first have a positive professional attitude. Your professional attitude affects the way you see your job, your co-workers, and your customers. It is important that you enjoy working with people and for the public. You show your professional attitude in various ways. Show you can work together with your teammates and be respectful and co-operative. Your fellow staff will notice that you are positive, sincere, and open-minded, and they will be the same way with you.

If you have a desire to make customers happy, they will notice and respond in a positive way. If customers bore you or you feel you are too good to be serving them, they will feel you don’t care about them.

Customers pick up on your attitude, whether it is positive or negative, often before you say anything. Being honest, friendly, and accommodating to the special needs of customers will be noticed and appreciated.

Professionalism:
- your approach at work
- engaging in your work with seriousness and efficiency
- demonstrated through your attitude and appearance

Attitude:
- a feeling or emotion toward a fact or state
- an opinion or way of thinking, e.g. being friendly or helpful
Learning Activity #7

Remember to write in complete sentences and check for correct spelling and grammar!

1. Rate your professional attitude toward working in retail. This quiz will help you to measure your professional attitude toward working in the retail industry.

Circle the number that most closely states what you believe:

1 indicates that you strongly disagree with the statement
2 indicates that you disagree with the statement
3 indicates that you agree with the statement
4 indicates that you strongly agree with the statement

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that you must be open-minded and consider the ideas of other staff while at work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe that you should treat customers with a positive attitude regardless of their age, race, or appearance.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Even on personally difficult days I would have a pleasant attitude and remain professional.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe it is important to be patient and a good listener with a difficult customer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe it is important to be honest and admit mistakes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe it is important to be self-motivated and do things before being asked.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe it is important to show enthusiasm and excitement about the products I am selling.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
From: Customer Service…it’s more than just “Thank you, come again!”

| Being flexible is part of having a positive attitude. | 1 | 2 | 3 | 4 |
| Challenges can turn into rewarding opportunities. | 1 | 2 | 3 | 4 |
| I believe it is important to be customer-oriented, e.g. helping a customer before stocking shelves. | 1 | 2 | 3 | 4 |

2. Choose one of the above statements that you most strongly agree with or feel is most important and explain why below.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. Choose one statement from the table that you either strongly disagree with or feel is least important and explain why below.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
4. Now add up all of the numbers that you circled on the table. Mark down your total score and look below for the rating closest to your score.

Your Score: ____________________

Above 32: You have an excellent attitude and understanding toward the importance of professionalism in retail.

Between 20 - 32: You have a few doubts about the importance of professionalism in retail.

Under 20: You may need to think about your attitude and understanding toward the importance of professionalism in retail.

5. Bonus Question: Were you surprised with your evaluation? Use the lines below to explain your thoughts about the quiz you just finished.

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

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Your Professional Attitude

“When you expect the best, your mind focuses on the best.”

When you get up in the morning, you have two choices about your attitude. You can believe that…

- Today is going to be a wonderful day.

or

- Today is going to be a lousy day.

The choice is yours. What will you choose? Your outlook has a definite effect on how you will feel for the rest of the day. Your choice of words can change your thoughts. These thoughts can change your life. Think of a positive phrase, for example:

Today is going to be a wonderful day.

See yourself in your mind going through the day with this attitude. Greet your co-workers and customers with a smile and a positive remark. Look them in the eye as you begin the day. As the day progresses, you may find your positive attitude beginning to waver. Perhaps someone has pushed the wrong button. Feelings of anger, stress, and self-doubt can begin to creep into your mind. This is when you need to take a quick break and repeat your positive phrase to yourself. Take a few deep breaths, put a smile on your face, and let the negative thoughts go.
A positive attitude will reduce stress in your work life. Research suggests that as much as 80% of all disease may be because of stress. People bring their home problems to work and their work problems home. The following symptoms are directly related to stress:

- being late
- staying home from work
- poor job performance

Try to keep a positive attitude. If you start to smile, soon you will forget what you were frowning about.

**Checklist Before Work:**

DID YOU...

- Get enough rest
- Have enough to eat.
- Practice good grooming.
- Leave your personal problems at home.
Helpful Reminders

• Customers are willing to wait patiently longer if you let them know you know they are waiting.

• Your attitude sometimes speaks so loudly that customers cannot hear what you are saying.

• Customers are the purpose of your work, not an interruption.
Learning Activity #8

Can you think of other reminders? Share with a partner, group, or work on your own and write down any new reminders you come up with.

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________

• ____________________________________________
Rate Your Self-Confidence

You may have rated yourself high in the attitude exercise, but that will not be enough to make you a retail associate professional. If you are too timid or shy, you will not be able to approach customers with confidence.

The following activity will help you discover if you need to develop your self-confidence more.

Learning Activity #9

1. Rate your self-confidence.

Circle the number that corresponds with what you think.

  4 indicates you strongly agree with the statement.
  3 indicates you agree with the statement.
  2 indicates you disagree with the statement.
  1 indicates that you strongly disagree with the statement.

<table>
<thead>
<tr>
<th>I will be able to approach customers with ease.</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have a quick, easy smile.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>I always speak first.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>I look forward to meeting strangers.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>I enjoy walking into new social situations.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>I always look my best for my job/situation.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>When required, I can easily interrupt a conversation.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>
It is natural for me to be friendly and open. 1 2 3 4
I would quickly introduce myself to a famous person. 1 2 3 4
I am secure inside. 1 2 3 4

2. Choose one statement that you strongly agree with and can do with ease. Explain why below.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. Choose one statement that you strongly disagree with and find difficult to do. Explain why below.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
4. Now add up all the numbers you circled on the above table. Mark down your total, and look below for the number that is closest to your number.

Your score: _____________________

Above 32: WOW! You are on the right track!

Between 20 – 32: You need to improve your self-confidence around people. This will come with increased experience.

Below 20: You may not be comfortable enough to work with the public. It is a skill that can be developed with sincere effort.

5. Bonus Question: Were you surprised with your evaluation? Use the lines below to explain your thoughts about the quiz you just finished.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

If you scored high on both the attitude and the self-confidence exercises, you have a winning combination as far as professional attitude and self-confidence is concerned. Congratulations! Give yourself a big pat on the back!

If you scored lower on self-confidence than attitude, there is nothing to worry about. You are simply giving yourself a signal that you need more experience dealing with the public.
What Makes A Positive Personality?

Appearance

First impressions are very important in everyday life and they are especially so in the retail industry. In general, there is a belief that your “outer you” reflects your “inner you”. Therefore, wearing the right clothes is an important aspect of your job. If you look untidy and sloppy, people will think you will do untidy and sloppy work. This isn’t always true, but it is a common way of thinking. Unfair as it is, you are often judged on your appearance.

That is why it is so important to look your best in any situation, especially in retail. Your appearance will influence how your co-workers and customers view you. You will be in contact with many people every day. You want the people you work with to respect and feel positively about you. You also want your customers to return to your place of business. Therefore, you must have a pleasing outer appearance. Remember to give yourself extra time each day before you go to work to make sure you look the best you can. You never know who you might meet at work or how important that impression might be!

Confidence

There are two kinds of confidence.

1. The first and most common kind of confidence comes from other people’s views and opinions of you. This kind of confidence is based on external factors. Although other people’s good opinion of you gives you a great and rewarding feeling, it is not always dependable. For example, if all of your confidence in your work is based on external feedback, you may easily lose your confidence if you are suddenly given a warning or
have an issue at work that is difficult to resolve. Confidence can disappear if you do not have the internal type of confidence first.

External:
- coming from an outside source
- based on a surface or superficial level

2. The second kind of confidence is much more important and that is the confidence you have in yourself. This confidence grows when you really try to achieve something, or when you lose something and grow through your loss. It also grows when you learn to trust your judgments and perceptions. When you learn to like and accept yourself, internal confidence grows. Although it is the most difficult and challenging type of confidence to work on, it is the only kind that results in definite rewards and inner strength. Indirectly, it results in receiving external confidence, too!

Internal:
- coming from an inner source
- based on a personal or soulful level

Creativity

Creativity is the ability to think around and beyond the obvious to solve problems. Creative people think about problems as challenges and find ways to come up with new and exciting solutions. Creativity is a quality that everyone has, but it must be practiced. If you use a creative approach in your work and your life, you will open up many great opportunities and experiences!
Determination

Determination is about sticking at things and not giving up. It is about seeing things through to the end and using your creativity to overcome problems. Being determined means that if you don’t succeed the first time, you will START OVER. By following things through, your self-confidence will grow. Determination is a quality that will result in a feeling of personal power when you have achieved your desired plans and dreams.

Enthusiasm

The main quality that retail employers look for is enthusiasm. It is the greatest quality you have to sell. Enthusiasm is:

- a zest for living
- an interest in many things
- curiosity
- a high energy level at work and in life
- great eagerness

Enthusiasm is a powerful quality because it affects the way you view your surroundings. With an enthusiastic approach, you are better able to make positive things happen.

Imagination

Using your imagination and picturing yourself in positive situations is a wonderful characteristic to develop. Through using your imagination, you can create the person you most want to be. Feeding this image into your mind everyday influences who you will become. You will get closer to that image. In time, and with developing the above qualities, you will be able to live your life as you “dream” it. You can use your imagination to build your self-confidence. A positive personality is very powerful. It is a combination of creativity, determination, enthusiasm and imagination. Continuing to develop these parts of your personality will increase your internal and external confidence.
Learning Activity #10

Read through each section of what makes a positive personality and find what you think is the most important point of each section. Be certain to explain why you think it is so important by using examples or past experiences.

1. Appearance:

2. Confidence:
3. Creativity:

4. Determination:

5. Enthusiasm:

6. Imagination:
Communicating Your Best Image

Preparing to be “on stage”, looking your best, and making a good impression are all part of being professional. Good grooming is so important that many jobs have a dress code.

**Three reasons to take a new look at your image:**

- Staff and customer reaction, whether it is positive or negative, will depend on the image you send out.
- There is a direct connection between how you look to yourself and your attitude toward others.
- The better your self-image, the more positive your attitude will be.

**A Note On Smoking**

- Cigar, pipe, and cigarette smoke has a smell that is unpleasant to most people.
- This smell clings to clothing, skin, and hair; it clings to you!
- Places of business that allow smoking usually have a distinct smoky smell that clings to upholstery, curtains, carpets, even merchandise (especially food!)
- Most smokers don’t notice this smell because they are so used to smelling it.
- Even if you don’t smoke at work, but smoke at home, your clothes will still smell like smoke, because smoke clings to everything in your house.
Therefore...

If your workplace allows smoking, there is not much you can do about the smell. It will cling to you. If your workplace does not allow smoking, and you choose to smoke on breaks, the smell will cling to you. It is a good idea to use breath mints and a body spray. Look for something designed for smokers. Be careful with perfumes or anything with a really strong scent. Often, this just adds to the problem and you end up smelling like smoke and a lot of perfume. This is not very pleasant to the people you work with or the people you will be serving. Be prepared for customers to react to the smell. If you just came back from a break where you smoked even one cigarette, you will smell like stale smoke.

Perfume and Aftershave

Yes, it smells nice, but...

Smelling your best is as important as looking your best. However, problems can come up when we use too much perfume. Have you ever noticed that over time you become less able to smell your own perfume? We become so used to the smell that we don’t notice it on ourselves. This is when it becomes a problem. We love the smell so we put more on so we can smell it. We end up smelling like we took a bath in our favourite scent! This is not very pleasant for others.

There are also allergies to consider. More people are becoming allergic or sensitive to perfumes and body sprays. If you work with the public, then you need to respect this. You can wear your perfume on your own time. While you are at work, part of a professional attitude is showing respect and being considerate of others.

The following items are usually scented:

- soap
- shampoo
- conditioner
- hair gel
- powder
- deodorant
- perfume
- body spray
- mousse
- shaving cream
- hair spray
- aftershave
When these scents get mixed together, a whole new scent is created. If mixed in a laboratory, they probably wouldn’t smell very nice, and you probably wouldn’t choose to wear it! Keep this in mind when you are getting ready for work.

**A Note On Body Odour...**

It is a smelly subject, and it makes people uncomfortable to talk about it, but the last thing that you want to do is offend people at your workplace by smelling like body odour!

**Here’s the deal...**

1. You need to shower everyday. If you cannot shower or have a bath, you need to wash.

2. You need to wash your hair at least every other day. Hair picks up odours. Greasy-looking hair is unpleasant to customers and is not professional.

3. You need to use deodorant.

4. You need to brush your teeth after eating. Bring a toothbrush with you.

5. If you eat garlic, brush your teeth, and chew a breath freshening gum. Try to avoid garlic if you know you will be working with people.

6. If you are doing manual labour, it is difficult to stay fresh smelling. Shower each day, wear clean clothes, use deodorant, and stand downwind from people (just kidding!).

7. Wash your clothes regularly. It is okay to wear clothes more than once if they are still clean looking and clean smelling. Your clothes absorb sweat. If your clothes smell sweaty, choose something else to wear to work.
Being Positive!

Sometimes, people get bored at work. This can result in a negative attitude. Staying positive at work means staying motivated and asking yourself, “What can I do next?”

When there is a long time between customers, it can be difficult to stay eager and enthusiastic. Sometimes, it may even seem that staff are bothered by the presence of customers! Staying alert and keeping a positive attitude toward your customers can be a big challenge. This can be the most difficult part of the job.

The following are some things people should not do while at work:

- Make personal telephone calls
- Read a magazine or book
- Play on the Internet
- Talk with friends who come in to the store
- Sit or lean on countertops
- Daydream
- Write letters, make lists, or doodle
- Eat a snack
- Do hair or make-up
- Turn music up loud
- Gossip or joke with co-workers

The following is a list of things you can do to keep busy when there are no customers:

- Return work-related phone calls or email messages to customers or other stores
- Read company notices and updates
- Clean! Dust shelves, vacuum or sweep floors, wash windows
- Restock shelves
- Tidy up back room
Learning Activity #11

Read the following statements. Fill in the missing word you think fits best.

1. Staying ____________ is better for your attitude than being lazy.
2. Being bored at work can result in a ____________ ____________.
3. One way to stay positive during quiet periods is to take the initiative and ____________work for yourself.
4. Staying ____________ all the time is a big challenge.
5. Gossiping over problems with a co-worker is ____________.
6. Negative attitudes chase ____________ away.
7. Sometimes employees can seem ____________ by the presence of customers.
8. Making ____________ telephone calls at work is inappropriate.
9. Tidying up is a ____________ way to keep ____________ when customers are not in the store.
10. Ask yourself ____________ ____________ ____________ ____________ ____________ to help you stay positive at work.
11. Reading a magazine is ____________ while at work.
12. Two things you can do to keep busy while at work are ____________ ____________ and ____________.
Teamwork

If you have played organized sports, you know the great feeling of satisfaction that comes with being a team member. A group of people becomes closer when people who work together share a victory or reach a common goal.

In the retail industry, you will get plenty of chances to show you are a team player. Doing your share of the work, and helping others is all part of being on the team. The more successful you and your co-workers are at making a team effort, the more satisfied the customers are going to be. It is hard to do it all by yourself.

Learning Activity #12

Let’s put teamwork into practice. Choose at least one of the following learning activities.

Activity #1 - Skipping

Materials: 2 skipping ropes

Directions:
- Divide into 2 teams with one person on Team A and the rest of the group on Team B
- Each team is given a skipping rope.
- Each team is asked to complete 100 skips.

Before you start, ask yourself what might happen. Make notes about your thoughts on the lines below.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Activity #2: Playdough Village

Materials: 4 containers of Playdough, stopwatch

Directions:

- Divide into 2 teams with one person on Team A and the rest of the group on Team B
- Each team is provided with an equal share of Playdough.
- Each team is given 10-15 min. to build a village out of the Playdough.

Before you start, ask yourself what you think might happen. Make notes on your thoughts on the lines below.

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________
After you have finished, discuss this activity as a group. What happened? Before the activity began, what did you think might happen? Did it turn out the way you thought it might? Make notes on your discussion below.

Back-Up Tasks

Every job in retail has back-up tasks. These are tasks that need to be done to keep the work place ready for customers. They include jobs like restocking shelves, sweeping, and dusting. They are often jobs that people do not enjoy doing.

Some examples of back-up tasks are listed below:

- Airline attendants clear dishes.
- Servers clean and stock shelves.
- Sales people sweep floors.
- Booksellers stock the shelves.
- Florist sales people arrange flowers.
- Clothing sales people arrange clothing displays.
- Receptionists do filing.
- Bartenders wash glasses.
Learning Activity #13

1. What are some back-up tasks you have done in the past? List them below in point form. Name some other jobs, and their back-up tasks may be.

<table>
<thead>
<tr>
<th>Job</th>
<th>Back-Up Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working in a museum</td>
<td>Mowing the lawn</td>
</tr>
</tbody>
</table>

2. What is it like to work with someone who does not do his or her share of the back-up tasks? Give examples.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

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Customers Should Always Come First….

However, those who do not do their share of back-up work between serving customers are not being fair to their co-workers. When employees have their job performance reviewed, everything from performance on back-up tasks to the way customers are treated should be rated.

Susie and Sylvia were hired as cashiers in a large store on the same day. At the start, Sylvia was far better with customers than Susie. Sylvia did not pitch in and do her share of the back-up work. As a result, other staff had to do more work.

Susie got better with customers, and she did more than her share of back up work. She did this without neglecting customers in any way. When business slowed down a few months later, it was necessary for the supervisor to let one of the newer cashiers go. After a discussion with management, it was decided to let Sylvia go and keep Susie because, according to management, Susie’s overall performance was better.

Moral:

“Be as good as you can be at customer relations, but pitch in and do your share of the less glamorous work.”

Qualities Employers Look For:

Enthusiasm

Employers are looking for people with:

- A high energy level.
- A zest for life.
- An interest in many things.
Hard Working

Don’t goof off at work. There are plenty of chances to do that on your own time.
Make sure:

- All your tasks are done.
- The customers are happy with your service.

When you reach these two goals you will feel a sense of accomplishment at the end of the day.

Honesty

- Do not take advantage of your employer.
- Be on time even if there is no one there to make note of your arrival.
- Never use the employer’s goods for personal purposes.

Initiative

- Do not wait to be told what to do. If you see something that needs to be done, do it.
- Never stand around because you think there is nothing to do. There are always lots of things to do!

Look around the store and ask yourself:

- When was the last time the windows were washed?
- Do the shelves and counters need dusting?
- Do the floors need sweeping or vacuuming?
Loyalty

- It only takes one unhappy employee to create lots of bad feelings within the company.
- Real issues should be brought up to management behind closed doors.
- Don’t say negative things about your company. When people find out there are problems in a company, they tend to stop doing business with them.

Professional Development

- An employer appreciates an employee who continues to update her skills.
- You may not be paid for your professional development time.
- The new things you learn will be of enormous value to you.

Stability

- Employers prefer employees who are stable.
- Frustration and difficult times occur in every job. Hang in through these times, and you will be rewarded when the good times return.
- Leave your personal problems at home. If you are having a bad day, do not take it out on the customer.
- Talk to your supervisor about what is going on, and try to keep your emotions under control while on the job.
1. Be dependable - put in a full day of work.
2. Work well with your supervisor.
3. Know when to ask questions.
4. Cooperate with co-workers.
5. Carry out your responsibilities.
6. Take pride in what you do.
7. Show initiative - learn new skills and take on new tasks.
8. Look your best.
9. Control your emotions.
10. Become part of the organization.
20 Ways To Keep Your Job

1. Be dependable.
2. Follow instructions.
4. Manage time and materials efficiently.
5. Get along with a variety of people.
7. Be punctual.
8. Adapt to varying work situations.
10. Be loyal to the employer.
11. Work as a team member.
12. Work well under tension or pressure.
13. Use initiative and imagination.
14. Make decisions on your own.
15. Be neat and clean in appearance.
16. Follow safety regulations.
17. Use information, materials, and equipment.
18. Use appropriate communication skills.
19. Use appropriate math skills.
20. Organize work activities of others.
Learning Activity #14

Remember to write in complete sentences and check for spelling and grammar!

1. What are five qualities employers look for? Explain why you believe these qualities are important.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. What are five things that are important for keeping your job? Explain why you believe these are important.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
3. What are three things listed in the 20 ways to keep your job list you have had trouble with in your past jobs? How will you work on these skills in your next job?

Team Meetings

These are also called sales meetings, office meetings, or staff meetings. Some companies will hold very formal team meetings, and others will have more informal ones. Meetings are scheduled for a reason, and people usually have roles to play. Often, the owner or manager of the business will run the meeting. There is sometimes a timekeeper who keeps things moving along. There is sometimes a recorder who takes notes of what happens. Everyone is a team member and is expected to play an active part in the process.
Teams meet to:

- update the staff on new procedures, trends, and needs
- find ways to continue to improve performance
- find ways to solve problems
- motivate and involve everyone

A team has:

- a common goal
- a need for each member
- awareness that they are a team
- a shared way of doing business
- to work together part of the time
- the ability to get more done by working together than working on their own
As members of a team, we need to:

- learn to speak up in groups
- take responsibility for our own actions
- learn to give our opinion
- say no
- receive and respond to criticism
- make requests
- negotiate for something we want
Learning Activity #15

Remember to write in complete sentences and check for correct spelling and grammar!

1. Using the information from the above reading, decide whether or not you believe teams are a valuable addition to the retail workplace. List the pros or the cons (the reasons for or against). Write two paragraphs stating your opinion and give reasons to back up your opinion.
2. Read the following case studies and choose one. Appoint a manager, recorder, and timekeeper. There should be at least five to seven people in your group. You are the team that has come together to solve the problem. Decide on a presenter who will talk about the process you followed in your meeting, what the problem was, and what you as a team decided to do. Don’t forget to use polite forms of interruption such as “Excuse me” or “I’d like to add…”

**Case Study 1:**
Jim’s hardware store is in financial trouble. A new hardware store has recently opened two blocks away. They have been doing a lot of promotional sales, and this has hurt Jim’s business. The owner has called a staff team meeting to ask for creative and/or financial solutions to the problem.

**Case Study 2:**
A large department store chain has earned a reputation for poor customer service. Management has put together a work team of supervisors and front line sales staff. They have a day of paid time to come up with new ideas for better customer service.
a. Write down any great communication skills that you saw or were a part of in the team meeting.

b. What ideas and solutions did your team meeting come up with?

Asking For Clarification

Asking for clarification is not a negative thing to do. If you are not sure that you understand a process or a word, you need to feel comfortable asking your co-workers and supervisors for clarification.

Clarification:

- to make clearer; to ask for further information
Learning Activity #16

Remember to write in full sentences and check for spelling and grammar!

1. In this exercise, a supervisor is telling you about the new policy of carrying a beeper when you are working. You have questions about what to do if it beeps and you are with a customer. Do you stop and find a phone? What about when you are on your lunch break? Work with a partner and create a discussion between you and your supervisor using the following language:

- I’m sorry, could you…
- Let me clarify, I heard you say…
- I’m not sure what you mean…
- Can you suggest…
- What if…

---
Think about the workplace today. It is constantly changing. Does the saying below suggest anything to you?

“Elephants have a hard time adapting. Cockroaches outlive everything.”

Source: Peter Drucker

2. How does this statement relate to the retail workplace?

______________________________________________________

______________________________________________________

______________________________________________________

3. Visit a local retail store and look around. Spend at least thirty minutes looking at the ways that retail associates behave and interact with each other. Talk to some of the sales associates and ask them how important they believe teamwork is to their jobs. Prepare at least three questions you will ask. Write them below. Have your instructor check these before you go on your visit to be sure you are well prepared. Be certain to choose a large retail operation with many staff members, so you can get a good sense of how the staff works together.

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________
On your return from your visit, record your observations below.

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Features Of Teamwork

The following are some features of working in a team setting:

- Work co-operatively
- Share responsibilities
- Offer support and encouragement
- Give praise and positive feedback to co-workers
- Remain open to new ideas and feedback
- Work as a team to make a sale
- Take part in store meetings and events
- Reach common goals together
- Consider how your actions will affect other staff members
- Respect other members of staff
- Communicate regularly and accurately
- Honour commitments to other staff
- Resolve internal issues
- Share ideas and information
- Assist with training of new staff
Learning Activity #17

1. List five features of being a good team member. Explain why you believe these are important.

2. You work in a clothing store and are teaching a new member of the staff how to set up the front window display. You have asked her to put in the store’s best-selling line of tank tops and jean skirts. She does a great job of displaying them in an appealing and attractive way, but you notice the brand name and sale price on the jean skirts can’t be seen from the outside. This is important for the display because customers will able to identify the brand name and great selling price at your store. What should you say to the employee?
3. Your co-worker is serving a customer who doesn’t seem interested in dealing with him. You have helped this customer before and have built a good relationship with him. What should you do?

4. Your co-worker has asked you to work her regular Sunday shift because she would like to be at her daughter’s soccer tournament. She has told your manager she has asked you to fill in on Sunday. You have told her you need to check your daybook at home. You realize that you have an exam on the following Monday for the college course you are taking and you really need the time to study. You will not be able to take your co-worker’s Sunday shift after all. What should you do?
Professionally Speaking

Name Calling

Think back to when you were a child and how you felt when the other kids teased you or called you names. It didn’t feel very good and sometimes it really hurt your feelings. Spoken words show how we think. They have a big impact on how we get along or don’t get along with each other.

Some of the names people have given to people from other cultures over the years are insulting. People sometimes use these names out of ignorance. They either don’t know the proper name or don’t understand that calling someone by a certain name can be hurtful.

If someone you know, or someone at your workplace, calls others by hurtful or rude names, speak up. Tell them how you feel in a way that will help them make a change without placing blame on them.

If you have used a hurtful name, by mistake, or in a time of stress or anger, don’t defend your mistake or give excuses. Just apologize and try not to make the same mistake again.

Follow the golden rule and treat others as you would like to be treated yourself.
Humour

Do not tell ethnic jokes or stories that make fun of a person’s culture. All, or most of these jokes make a group of people seem like second-class citizens. They make certain features of a group of people seem unpleasant or less than human.

Sexual humour, more often than not, puts down both men and women. It may even result in charges of sexual harassment.

Telling ethnic or sexual jokes is like name-calling. It is often used to bond a group and keep “outsiders” in their place. It may make us feel better than others for a few minutes when we are doing it, but it allows negative views of others to keep on happening.

Unless you are sure that the jokes you tell won’t offend any group or person - do not tell them!
Learning Activity #18

Please write in complete sentences and check for correct spelling and grammar!

1. What is the golden rule?

2. Question: How would you handle a joke told by someone else that was unfair to you or another cultural group? Put a mark on the line beside the answer that best suits you. Would you:

   ______ 1. Ignore the joke and go on working, but take the joke teller aside later and tell him or her your feelings on the matter?

   ______ 2. Tell the joke teller how you feel right then and there, in front of the other workers?

   ______ 3. Tell a proper joke as an example of the kinds of jokes that should be told?

   ______ 4. Laugh now, but tell the joke teller later, in private, how uncomfortable you felt?

   ______ 5. Tell an even worse joke about a group that the joke teller belongs to.

Discuss the answers in a group or with a partner, if possible. Remember to be sensitive to other people’s opinions, and show them respect.
3. Of the five responses listed on the previous page, which do you think is the best response? Explain your answer, using examples or situations from your past.

Bridging The Language Barrier

It is easier for us to speak the language we learned first. For someone who’s first language is not the one used in the workplace, it can be exhausting to think and speak in another language.

In the workplace, you may come in contact with people who have not yet mastered the English language. Here are a few tips that can make it easier for everyone involved:

- Speak more slowly
- Use simple words
- Avoid slang
- Don’t imitate the other person’s accent or limited use of the language
- Don’t raise your voice or speak louder - this is rude.

Gestures And Body Language

Gestures often say more than words. When we move our hands, arms, and head, we make it easier for people to understand what we mean.
Gestures are usually understood within your own culture, but may be easily misunderstood by other cultures. For example, consider the gesture for “OK” below. What does that gesture mean to you?

In Canada, USA, and much of Europe this gesture means okay, everything is fine, or perfect.

In France it means, “He’s a zero, don’t take him seriously.” Or it is a zero or failure.

In certain Mediterranean countries this sends a very rude message.

In Japan this means, “Please give me change (coins)”. 

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Comfort Zones

Each of us has different feelings about the space around us. Some people need more space between themselves and other people than others do.

When we are with our partners, family, and close friends, the space that is comfortable for them and for us will be closer than the space we need between us and a co-worker or casual friend. Most of us call this space our personal space.

The distance between ourselves and friends and co-workers where we are usually most comfortable talking and working is called our social space.

As long as we can recognize and interact with others in some way, this is our zone of public space.

Your comfort zone will depend on your own experiences and background. Getting too close may make another person think you are being aggressive or pushy. Staying too far away may make some people think that you are cold, impersonal, afraid, or not interested.
Learning Activity #19

Please write in complete sentences and check for correct spelling and grammar!

1. What are five tips to use to speak with someone when English is their second language?

2. This is a space exercise. Get a partner. If you are unable to work with a partner, please have your instructor do this learning activity with you. Take turns to find out about each other’s personal space. Circle and approach your partner, while talking. Get her/him to say, “Stop” when you are getting too close. This will demonstrate the difference in everyone’s “space”. Discuss as a group, if possible.

At what point did you get uncomfortable?
Do you get uncomfortable in crowded situations?
Wrapping It Up: Understanding and Respect

Get Information About Others

You can learn about other peoples’ experiences and backgrounds in many ways. You can read books and watch videos. Still, what you learn in books and videos only hints at what other people actually experience. They help you to understand how others might be different from you. You need to get to know people, not just about them. We have a lot to learn, and we should be polite, and very slow to judge what we see.

Respect Individual Differences

None of us can form an opinion of a person based only on what we know about their experiences and background. However, knowing what people value, and about other customs and ideas, will give you helpful clues when dealing with others. Every person is unique and has many dimensions. We need to pay attention to the whole person.

If we take into account:

THE INDIVIDUAL

+ PERSONALITY

+ EXPERIENCES AND BACKGROUND

+ THE SITUATION

We start to reach...

“The Whole Person”
Be Curious and Ask Questions

The best information comes from people themselves. Be friendly, courteous, respectful, and non-judgmental. The following are some appropriate ways to ask questions when you want to know how others think:

- What does it mean to you when…?
- What do you say to yourself about…?
- What is it like for you when…?
- What do you imagine when you say…?
- How do you picture it?
- Tell me what is important to you.
- Show me how you would do it.
Communication Skills

The ability to communicate well with your co-workers, supervisors, and customers is a very important skill in retail. People react to how they are treated, whether good or bad. In any work environment, stressful and frustrating experiences occur. Your co-workers and your employer will rate your abilities and professional manner by how you handle these situations.

When you speak in a firm yet co-operative manner, you leave a very different impression than when you speak in an argumentative or competitive way. The words you choose to communicate ideas or feelings can make the difference between beginning an argument or beginning a discussion. The following are types of statements that will start positive discussions:

- **I want statements**, for example, “I want you to help me.”
- **I feel statements**, for example, “I feel overwhelmed about the deadline.”
- **I hear you statements**, for example, “It sounds like you had a busy morning as well.”
- **Telling about ourselves statements**, for example, “I do not feel comfortable climbing up the ladder in the back room because of my fear of heights.”

The following are types of statements that will start arguments:

- **Cutting off communication statements**, for example, “Leave me alone.”
- **Insulting questions**, for example, “Why can’t you seem to do anything right?”
- **Meaningless statements**, for example, “This is unfair.”
- **You must statements**, for example, “You should have told me.”
Listening Skills

An important part of communicating in the workplace is listening skills. The following are helpful hints to use while listening to staff, supervisors, and customers.

Focus Your Attention

- Keep the speaker at the center of your attention and maintain a comfortable level of eye contact.
- Looking around the room or reading will make the speaker feel they are not being listened to and may cause that person to feel upset or frustrated by you.

Tune In To Understand

- Listen carefully so you clearly understand what the speaker is saying.
- Listen not only to what the speaker is saying but how they are saying it.
- Restate, in your own words, the speakers’ concerns, whenever possible. For example, “That sounds very upsetting for you.”

Ask For More Information or Opinions

- Encourage the speaker to tell you more by asking questions.
- Wait for a pause, and do not interrupt.
- Ask for his opinion to make sure you understand what he is telling you.
Keeping Cool When You’re Not

The retail environment can be very stressful. Managing your customers’ needs, answering the telephone, completing expected tasks, making sure proper opening and closing procedures are followed, and handling transactions can be very demanding. At stressful times, the last thing you want to do is say something that will make the situation worse. The following are some helpful hints for managing those times when you feel you are close to “losing your cool”!

- **Take a deep breath.** Try to calm yourself down by breathing.
- **Get a grip.** Try to name the feeling that you need to control.
- **Think it through.** Handle the immediate situation in a positive way. Focus on getting through the next short period of time. For example, until your next break.
- **Choose the best course of action.** Give yourself plenty of time to decide whether your feeling was a temporary one that does not need further action OR if you need to decide on a course of action to solve an actual problem.

Important:
- Do not act quickly in any situation that begins with feelings of being overwhelmed, stressed, or frustrated.
- A good idea is to wait 24 hours and see if your feelings are still as high as the day before.
- You will be thankful you did this because most of the time you won’t have made the situation worse, instead of solving the problem.
- The ability to “get through” stressful situations, not get stuck in those feelings, and continue your work will make you the type of employee people will want to keep.
- Imagine that when you get home you can really let your stress “hang out” by letting out a good scream in your pillow, taking a relaxing bath, or ranting to someone you trust.
- The very important part is that you will not have damaged the opinion your supervisors, co-workers, and customers have of you.
Communicating Clearly And Hearing Feedback

In work situations, it is very important to state opinions and ideas clearly. At your work, positive and negative feedback will be provided all the time. This happens so the way you do your job can be clearly checked and you can become better at it. Being able to respond to both positive and negative feedback in a positive way will show people at your place of work that you value your job. It can be difficult to hear negative feedback from your supervisors, such as criticism during an evaluation, and stay positive about your job. The following are some helpful hints:

- See it as important information about how to do your job and not about you as a person. Do not see it as a personal attack on you. Try to remain objective.

- Take the information and act on it! Do everything possible to change that part of your job into something you can do really well.

Common Thought:

“If I ask for help or information from my co-workers, it will look like I can’t do my job. If worse comes to worst, I will just do the job over.”

The truth is you cannot be expected to know everything. People will also be asking you for help now and again. It is not a good use of time and energy to plan to do a task again if you think you might not do it right the first time. You have the right to ask for help when you need it. People will appreciate your honesty and will notice that you want to do a task the right way.

Common Thought:

“It is easier to do my work and my co-worker’s work as well, than to ask her to do her share. I don’t want word to get out that I was making any demands on her. People will think I am just complaining or being unfair.”
The truth is you should not be doing the work of two people. Also, you cannot control what other people think. You have the right to expect your co-worker to do her part of the job. Talking to your co-worker about this may not be easy, but it is worth the effort to solve the problem. It may be a good idea to go to your manager first with a clear list of what you have been doing that is actually your co-worker’s responsibility. Remember: do not sound defensive or angry. Talk about it as a concern and remain clear and on track.

**Learning Activity #20**

Remember to use complete sentences and check for spelling and grammar.

1. What are three types of statements that begin positive discussions? Give your own example for each type.

   a. 

   b. 

   c. 

   d. 

   e. 

   f. 

   g. 

   h. 

   i. 

   j. 

   k. 

   l. 

   m. 

   n. 

   o. 

   p. 

   q. 

   r. 

   s. 

   t. 

   u. 

   v. 

   w. 

   x. 

   y. 

   z.
2. What three types of statements will begin arguments? Give your own example of each type.

a. 

b. 

c.

3. What are three hints that will help in making your listening skills better?

a. ____________________________

b. ____________________________

c. ____________________________
4. What are three helpful hints for getting yourself through stressful moments at work?

a. ____________________________________________________

b. ____________________________________________________

c. ____________________________________________________

5. Why is it a really good idea to wait 24 hours before acting on a stressful situation? Give two reasons.

a. ____________________________________________________

d. ____________________________________________________

b. ____________________________________________________

6. What are three hints to use when responding to negative feedback?

a. ____________________________________________________

c. ____________________________________________________

c. ____________________________________________________
Communication Skills Are Essential For Sales

Good communication skills are needed in any business. To sell your product, you must be able to explain the features that make the product unique. Often, choosing the right or wrong words can make or break the sale.

Below are some tips from the Canadian Professional Sales Association (CPSA) on choosing your words carefully:

Create a positive mindset. Change negative or pessimistic words like “rough”, “hard”, “tough”, and “difficult” with positive ones like “rewarding” and “challenging”.

Avoid using extreme words like “best”, “worst”, “always” and “least”, unless you can prove them. Change them to words like “frequently”, “rarely” and “usually”.

Learn a company’s unique terms, key words, and short terms, and drop them into conversation.

Try to sell your product or service by playing up your customer’s interests or hobbies.

source: www.strategic.ic.gc.ca (adapted)

Learning Activity #21

Read the above article and answer the following questions. Remember to use complete sentences and check for spelling and grammar!

1. Why do sales associates need excellent communication skills?
2. What is meant by “make or break the sale”?

3. Who is giving the advice in this article? Would you trust this advice?

4. What are the four tips given by the CPSA?

5. Choose one of the four tips and describe why, in your opinion, it is important for a sales associate in the retail business.
Learning Activity #22

Describe a product or service. Decide what is wrong with these sales lines. Then, rewrite them using the advice in the article. Remember to use complete sentences and check for spelling and grammar!

1. In a small health food store:
   “A lot of people don’t know this, but ours is the best green tea you will ever try. Much better than Mary’s down the street.”
   This sales line is wrong because
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   A better sales line is
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

2. In a small computer store:
   “This computer program is very difficult. I am the best person to teach you how to use it.”
   This sales line is wrong because
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   A better sales line is
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
3. In a sporting goods store:
   “These shorts will make you look good even before you get into shape.
   Try them on and you’ll see how they can disguise anything!”

This sales line is wrong because

A better sales line is

---

The Canadian Workplace

Employees in Canada are used to workplaces that:

- value teamwork
- provide feedback and evaluation in order to improve performance
- treat people with respect in the workplace

In Canadian workplaces, there are unwritten rules and expectations about doing business. We are comfortable in a business relationship if we are at an arm’s length. In many other countries, the personal space between people is much smaller. But when doing business here, remember… keep an arm’s length.

Making eye contact is also important. Making eye contact is believed to be a sign of listening, honesty, and respect. Because some people still believe salespeople are dishonest, it is important to be perceived as honest and that is what eye contact suggests. This is an example of non-verbal communication. Customers will read meaning into the way you stand, look at them, or greet them.

Time is also valued in the Canadian workplace. In workplaces, punctuality has great value. For example, meetings are scheduled with times for start
and finish clearly set. Customers also value their time. Transactions should be completed in a timely manner. For example, if you are working face-to-face with a client and a friend calls to chat, what do you do? One of the most common complaints about customer service in stores is being ignored.

Learning Activity #23

1. Match the words to their definitions.

a. __ teamwork 
   1. many changes in staff; people come and go a lot

b. __ performance appraisal
   2. working together to serve customers, solve problems in the workplace and/ or develop products

c. __ face-to-face
   3. making eye contact, smiling, showing interest and talking with a customer at arm’s length

d. __ high turnover
   4. a formal way for the employer to tell employees how they are performing at work and to discuss what needs to be improved; usually completed at the end of a probationary period and later, yearly
2. Match the phrase or word to the correct meaning.

a. ___ workplace culture
b. ___ arm’s length
c. ___ non-verbal communication
d. ___ unwritten
e. ___ eye contact
f. ___ punctuality
g. ___ dishonest
h. ___ calls to chat

1. communication using hand gestures, facial expressions
2. looking at someone directly in the eyes
3. telephones to talk; casual conversations on the phone
4. not to be trusted
5. a distance between two people who are not family members or friends
6. being on time
7. not expressed in writing
8. what makes a company unique: rules, policies, uniforms, etc.
3. In the workplace how do people greet each other? Match each type of greeting with a situation. For each greeting there is more than one possibility.

a. ___ greeting a customer for the first time
b. ___ greeting a customer who has been coming in for years
c. ___ meeting a new co-worker
d. ___ greeting a close relative
e. ___ greeting someone you see every day
f. ___ a social acquaintance
g. ___ your best friend

1. words only
2. a kiss (or two)
3. a hug
4. a handshake
5. a slap on the back
6. an air kiss
7. a smile
Commitment to Customer Service
Part 1

Why do you need Customer Service Skills?

Commitment to customer service in the retail industry is the most important area of your future job. Why? Because your business is people, and if people don’t come to your business, then you will not have a job. You want people to come back and bring their friends! To make this happen, you have to be a customer service professional.

So What Is A Customer Service Professional?

Customer
● a person who buys goods or services from a shop or business…* 

Service
● work, or the doing of work for another, or for the community…* 

Professional
● belonging to, or connected with a profession, skillful, competent, engaged in a specific activity as one’s main paid occupation…* 

Learning Activity #1

In your opinion…
Please answer in complete sentences and check your spelling and grammar.

1. What is customer service?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. What are some words you think of when you hear the words “customer service”?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. What are some words you think of when you hear the words “bad customer service”?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

4. Why do you think customer service skills are so important in today’s job market?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Customer Service Is Like A Game Of Baseball...

1. It is possible to do everything right and still not win.

2. Your batting average will increase if you cover all your bases.

3. When customers return because they have been treated well, YOU SCORE!

**Bases**

1st base → send a positive attitude to others

2nd base → identify the needs of your customers

3rd base → provide for your customers needs

**Home Plate → the customer returns!**
Customer Service Baseball

Second Base

Identify the needs of your customers

Third Base

Provide for your customer’s needs

First Base

Send a positive attitude to others

Home Plate

The customer returns
Learning Activity #2

1. Working in pairs or on your own, list as many places as you can think of where you might use customer service skills. If possible, share your ideas with the group. Add any new suggestions to your list. (example: restaurant)

_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
_____________________________                _____________________________
To be a Customer Service Professional you should:

- have a positive attitude
- have a cheerful outlook
- enjoy working with people
- enjoy working for people
- have a high energy level
- be flexible
- enjoy new experiences
- be sensitive to others
- allow the customer to be “right”, even if they aren’t
- see your job as important
- make the customer feel like #1

Learning Activity #3

1. Discuss this list in partners, or work on your own. Is there anything you would add to the list?

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________
2. What can success in customer relations do for you?

3. In addition to the money you will make, success in customer relations can do many personal things to help you.

There are 3 false statements below. Place an X on the line beside the 3 false statements.

_____ 1. Dealing with customers can be made into something more enjoyable than a routine factory job.

_____ 2. If you try hard, your first customer service job will bring out the best in your personality.

_____ 3. If you do not train yourself to enjoy customer service work, you will never be good at it.

_____ 4. Few executives start out in customer service jobs.

_____ 5. Those who quickly become good at customer service stay at their jobs longer and earn promotions.

_____ 6. Becoming good at customer service now will help you succeed in any job you may have in the future.

_____ 7. In your first customer service job, what you learn can be as important as what you earn.
8. Customer service work is less demanding than other jobs.

9. You meet fewer members of the opposite sex in most customer service jobs.

10. A smile uses fewer muscles than a frown.

4. Discuss your answers with a partner or think about your answers on your own. Give a reason for each choice in the space below.
Learning Activity #4

Most people remember a time when they encountered bad customer service. Two examples are a rude waitress or a salesperson that ignores you. Get into pairs and interview your partner about a situation where you experienced bad customer service. Write in sentence form, using the list below. Present your findings in a larger group, if possible. If you are unable to get a partner, work on your own.

1. Type of business: (for example: retail, restaurant, gas station)


2. The situation:


3. How I felt:


4. How I handled the situation:


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5. The effects of poor customer service:

As consumers, we have all encountered excellent customer service. Unfortunately, we don’t often give it the same attention or tell our friends about it as much as poor customer service. Get into pairs and talk to your partner about a situation where they encountered good customer service. Write in sentence form, using the headings below. If possible, present your findings to a larger group. If you are unable to get a partner, work on your own.

1. Type of business: (for example: retail, restaurant, gas station)

2. The situation:
3. How I felt:

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

4. How I handled the situation:

____________________________________________________________________________________

____________________________________________________________________________________

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5. The effects of great customer service:

____________________________________________________________________________________

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____________________________________________________________________________________
The Secret of Good Customer Relations

Below are eleven secrets for creating good relationships with customers:

1. You get back the kind of behaviour you send out.
   - When you send out a friendly signal to others, chances are good they will respond with a friendly gesture of their own.
   - The more friendly signals you transmit, (smile, happy voice, upbeat attitude) the more customers will like you.
   - The more that customers like you, the easier they are to deal with. It all starts with you.

2. You never get a second chance to make a first impression.
   - Unfortunately, negative first impressions are hard to overcome.
   - Those who are good at customer relations are constantly alert when customers come into view.
   - They rely on:
     - good grooming
     - friendly non-verbal signals
     - warm verbal greetings
   - Make sure your first impression does not need a difficult repair job at a later date.
3. Customer service experts are made, not born.

   - Everyone has the potential to be good at customer relations.

   - All it takes is:
     - a desire to serve
     - training

   - Stick with it. and you will learn to excel.

4. You have the right stuff.

   - There is no such thing as a specific personality that will make you outstanding at customer service.

   - Everyone can:
     - smile
     - be polite
     - have a good service attitude

   - No matter what it is, your special personality is all that you need. Learn to use the “stuff” you already have.

5. At times, it is natural for us to feel others are better than we are.

   - An inferiority complex is the feeling that you are not as good as other people. You feel that other people are better than you.

   - When you start to lose confidence, remind yourself that you look better to others than you may think.

   - Do something to improve your looks. Get a new hairstyle or buy a new tie.
6. People considered good-looking can be at a disadvantage.

   • It may sound strange, but sometimes physically attractive people get too much attention from co-workers and customers.

   • This may make it difficult to keep their minds on details of good customer service.

   • To protect themselves from unwanted attention, attractive people often act as if they aren’t interested, and customers may interpret this as cold or distant.

7. Select a good role model.

   • Once you are familiar with your new job, find a co-worker who is outstanding at customer service.

   • Model some of your actions after this person.

   • You might even ask this person to help you.

8. Make the most of your own special personality.

   • Customers will probably respond positively to any unique differences that make you who you are.

   • If you have an accent, or an unusual physical feature, relax and make the most of it.

   • Your customers and your boss want you to be yourself. Customers may see what you feel is a disadvantage as an advantage.
9. When approaching a customer, respect their personal space and allow the customer to become comfortable with you.

- Some customers may be shy or quiet by nature and may be uncomfortable at first in a new setting.
- Your challenge is to make the customer comfortable, so that they will relax.
- Until this happens, you cannot build a good relationship.
- If your approach is too fast, too personal, or too assertive, they may become more uncomfortable.
- The best plan is to let the customer adjust at his own pace.
- They will be glad you were patient, and a friendly relationship will have been started.

10. Consider yourself on stage.

- In a sense, those who work with customers are performers. They are rated and quite often praised by their audience. The way you perform in front of your customers will determine whether you will be classified as average, good, or superior by your boss. Your biggest reward, however, will come from your customers. The applause you earn will be in the form of:
  - a verbal compliment
  - a generous tip
  - a complimentary letter
- It can be as rewarding for you as the audience is for an actor. It can make you feel appreciated.
11. A customer will notice how staff treat each other.

- If there are problems between co-workers, these will spill over to customers through attitudes and in other ways. The way to be good at customer service is to be good as a team member.

This means being:

- friendly
- helpful
- cooperative

with your team members whether they are your favourite people or not. You cannot be angry with a co-worker and friendly with customers at the same time.

**Good Customer Relations = Good Business**
Customers: The Four Basic Needs

A customer needs to:

- be understood
- feel important
- feel comfortable
- feel welcome

Three Types Of Customer Service

You have all been customers in your lifetime. You know when you are getting good service and when you are getting terrible service. There are three types of customer service. They include:

Type I – Rude Service:

The first type of customer service is rude. You know when you are getting rude service. This happens when the sales associate treats you like you are an inconvenience to them. If they make a mistake, they make you feel you caused it. If you ask a question, they look at you as if to say, “How dare you disturb me?” They are the associates lounging on the counter talking to their friends, or on the phone and ignoring you.
Your goal:  never slip into rude service no matter how difficult the customer or how bad a day you are having.

Rude service means the customer may take their business elsewhere.

**Type II - Indifferent (they don’t care) Service:**

The second type of customer service is indifference.  This is when the sales associate greets you with a half-hearted smile, is very vague, and never goes out of his/her way to help you.  As a customer, you will get what you asked for, but with little help or assistance.  You might get pointed in the right direction, but little effort will be made.

Some customers may accept indifference from a sales associate, especially the first time they come into your store.  But with continued indifference, you can guarantee they will choose not to return to your store and will decide to take their business somewhere else.

It is the extras that impress customers and employers.
Type III – Hospitable:

The third type of customer service is hospitable. This is your goal as a customer service associate. A server who is hospitable is the one who greets you with an enthusiastic smile and a pleasant greeting. This server goes out of his or her way to make sure you are happy. Hospitable customer service means doing a variety of extra little, but noticeable, things for your customer. This could include helping a customer out to the car with their packages, getting a booster seat, or giving a balloon to a customer’s child. Helping a customer find the item they need by leading them to the department and showing them exactly where the item is located is one excellent example of hospitable customer service. This is something, as a sales associate, you can do everyday that will make a huge impact on how satisfied your customers will be.

This type of service is what it takes to keep customers coming back. They will also return with friends. You have to be the best you can be. As a sales associate, it is the little things you do and the pleasant attitude you have that will bring the customers back.

If the customers come back, you are making sure you have a job.
Learning Activity #5

Remember to use complete sentences and check for spelling and grammar.

1. What are the three types of customer service? Describe how it feels when you are a customer and experience each type of service.

   a. 
   
   b. 
   
   c. 
   
2. If possible, find a partner and talk about the following question. If not, work on your own. List some examples of rude or indifferent service. Check each item on your list as either indifferent or rude with a check mark. Present your ideas to the larger group. One example is done for you.

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<tr>
<th>Customer Service “Don’t”</th>
<th>Indifferent</th>
<th>Rude</th>
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<tr>
<td>Don’t eat while you are waiting on customers.</td>
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The six don’ts of a Customer Service Professional

1. Don’t… keep customers waiting needlessly.
2. Don’t… play favourites.
3. Don’t… give directions in an abrupt, negative manner.
4. Don’t… talk about personal or job-related problems in front of customers.
5. Don’t… allow customers to leave feeling unhappy.
6. Don’t… act bothered by the behaviour of a customer.
1. Don’t keep customers waiting needlessly.

Customers are generally patient and understanding. But they can become frustrated and unhappy when they are kept waiting while…

   a. An associate completes a personal phone call.
   b. A group of employees have a personal conversation.
   c. A waitress does another task while food gets cold.

Customers should always come first, and should never feel in the way.

2. Don’t play favourites.

It is a serious mistake to treat one customer better than another. For example, customers waiting in line at a cash register can see how a sales person treats those ahead. When their turn arrives, they want and expect to be treated in the same way. Playing favourites with customers is a quick way to get in trouble with your supervisor.

3. Don’t give directions in an abrupt or negative manner.

In a customer service job, you will be asked a lot of questions. For example, “Where are the washrooms?” “Where is the nearest restaurant?” Although these questions may come from people who are not customers now, they might become customers later. A problem only happens when answering the question gets in the way of your main goal of serving others. To be a customer service professional, you need to keep your attitude positive and not only give directions correctly but also do it pleasantly. In most cases, completing a job with a positive attitude takes the same amount of time as completing a task with a negative attitude. And you will also find you enjoy your day at work more!
4. Don’t talk about personal problems or problems at your work in front of customers.

Customers often hear cashiers, bartenders, postal clerks, bank tellers, or other service people complain openly about their job situation or a personal problem. Sometimes customers hear a sales associate complain to co-workers, and sometimes it is directed at the customer. In either case, it is in poor taste. If a co-worker tries to complain to you while you are serving a customer, simply say “I will talk to you later,” and give your full attention to the customer, where it belongs.

5. Don’t allow customers to leave feeling unhappy.

Customer complaints can happen, even in the best situations. If you can handle it yourself, then do so. If not, turn it over to your supervisor. Either way, it is important that you do your part to see that the customer is completely satisfied. If you let a customer to leave unhappy, he or she may never return. If, on the other hand, a complaint is handled well, the customer may feel better than ever about your business. Your goal should be to satisfy every customer that walks into your place of work, not just 99% of them.

6. Don’t act bothered by the behaviour of a customer.

It is only natural that you will respond in a positive or a negative way to the behaviour of others. When it comes to customers, it is best to hide your negative reactions so that you don’t make your job more difficult. Children cry; sometimes, the elderly are slow; people from different cultures may do things in a different way. Try to accept such behaviour as part of your customer service duties, and
continue to smile. If it is obvious that such behaviour upsets you, the customer will become upset, too.
The Five Do’s Of A Customer Service Professional

1. Do… acknowledge the customer
2. Do… focus your attention on the customer
3. Do… put the telephone on hold
4. Do… use the customer’s name
5. Do… thank the customer

1. Do acknowledge the customer.

This can be done with direct eye contact and a few words. If you are doing something that cannot be left, say, “I will be right with you.”

2. Do focus your attention on the customer.

Stop what you are doing and ask, “How can I help you?” Put a smile in your voice and on your face, and maintain direct eye contact. Be genuine. “MayIhelpyou” is not a word.
3. Do put the caller on hold.

If you are serving a customer and the phone rings, put the caller on hold. The customer in front of you is your first priority. If you think you will be awhile, find someone else to take the call, or ask to call them back.

4. Do use the customer’s name.

We all like the sound of our spoken name. Whenever possible, use the customer’s name. Often, you will get to know the customers and their names. A cheque or credit card will have the customer’s name on it. Take advantage of this and use the information. A popular department store chain has a policy that if you are paying by credit card or cheque and the cashier does not call you by name, they will pay you two dollars. They think this is an important part of customer relations and so should you. Use their first name only if they are regular customers, and if they do not mind.

5. Do thank the customer.

Always thank the customer for visiting your business. This applies even if the customer has not purchased anything. Be genuine with your thank you. “Thankyoupleasecomeagain” is not a word, either.
Learning Activity #6

1. What are the six don’ts for a customer service professional?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. What are the five do’s for a customer service professional?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. It is the little things that you do as a retail associate for the customer that will bring the customer back. If you give the customer something “extra”, they will usually return to your place of business and seek your help again.

Instructions:

Imagine you are a customer and you enter a large clothing store. Think of five “extras” that the sales associate could do to bring you back.

a. 

________________________________________________________________________

________________________________________________________________________
b. 

______________________________________________________________________

______________________________________________________________________

c. 

______________________________________________________________________

______________________________________________________________________

d. 

______________________________________________________________________

______________________________________________________________________

e. 

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______________________________________________________________________

If possible, share your answers with a partner and talk about the different ideas you came up with.

4. From the list below, select the top five “extras” that sales associates could do to make you want to go back to their store.

Sales associates could:

_____ show a sense of humour.

_____ give you directions correctly and pleasantly.

_____ treat you in a courteous manner.

_____ give you complete attention when you talk.

_____ recognize your presence when you first appear.

_____ make you feel important.
_____ do something special like seating you at a table, helping you with your coat, running after you to give you something you left behind.

_____ follow through and do what they said they would do.

_____ treat you with respect and dignity without becoming too personal.

_____ pay you a sincere compliment.

_____ call you by name.

_____ quickly stop routine work or talking with other employees to help you.

_____ show patience and understanding when you are undecided or confused.

_____ suggest an additional item that you need or enjoy.

_____ make your day more cheerful.

_____ make you feel better about yourself.

Remember:
- The five you selected may be more effective than others, but all help to bring customers back.
5. Go back to question # 4.

Read the list again and this time star the “extras” that you feel you do well. Congratulate yourself for doing them well!

Remember:
- Recognizing great customer service tips and actually doing them everyday at work are two very different things!

Choose three of the above “extras” which you do well and give a personal example of each.

a. ___________________________________________
   ___________________________________________
   ___________________________________________
   ___________________________________________

b. ___________________________________________
   ___________________________________________
   ___________________________________________
   ___________________________________________
Now circle the “extras” that you don’t do very well. Spend some time thinking about why you don’t do these things well. These are areas that you need to work on. If possible, share these in a group. Ask for ideas to help you work on these areas. Take notes if needed. When asked for advice or assistance, remember to offer it in a positive way. Your job is to help others in your group learn to be a better Customer Service Professional. You do not want to make someone feel bad for the things that they do not do well.

Choose three of the above “extras” which you feel you do not do very well and describe how you plan to work on these areas in your next job.

a. 

b. 

c. 

From: Customer Service…it’s more than just “Thank you, come again!” 2000
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C.

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“The Nice Customer”

I’m a nice customer. You all know me. I’m the one who never complains, no matter what kind of service I get. I’ll go into a restaurant while the waiters and waitresses gossip and never bother to ask if anyone could take my order. Sometimes a party that came in after I did has their order taken first, but I don’t complain. I just wait.

When I go into a store to buy something, I don’t throw my weight around. I try to be thoughtful of the other person. If a snooty salesperson gets upset because I want to look at other things before making up my mind, I’m as polite as can be. I don’t believe rudeness in return is the answer.

The other day I stopped at a full service gas station and waited almost five minutes before the attendant took care of me. When he did, he spilled gas and wiped the windshield with an oily rag. Did I complain about the service? Of course not, I never make a scene. I never nag. I never criticize. I wouldn’t dream of making a scene, as I’ve seen some people do in public places. I think that is uncalled for. No, I’m the nice customer, and I will tell you who else I am...

I’m the customer who never comes back!
Learning Activity #7

Remember to write in complete sentences and check for correct spelling and grammar!

1. The customer has walked into your store. What does your customer need? What is your job? What do you need to find out and/or do? If possible, work with a partner and make a list. If not, work on your own.
Finding out what the customer’s needs are and taking care of those needs is very important. Asking your customer open-ended questions will help you find out what they are looking for.

Ask the customer what they are looking for or what they need using the following types of questions:

- Who is using the item?
- Which brand names do they trust the most?
- How do you plan to use it?
- Where do you plan to use it?
What are the customer’s needs?

Find out what the customer’s needs are and

What they want.

Why they want it.

narrow the field.

Picture the customer standing in front of a shelf of 25 different irons that are all different brand names, with different features, and different shapes, all claiming to be the iron to buy!

- If your customer wants an iron, it is your job to find out what the needs are, and narrow the selection down.
Learning Activity #8

1. What do you need to consider? Make a list of the things that you need to consider when narrowing the field for a customer.

__________________        ____________________        ____________________
__________________        ____________________        ____________________
__________________        ____________________        ____________________

As a professional retail associate, your job is to make the buying experience as easy and painless as possible. This will almost guarantee that when customers want a new product that your company carries, they will come back to your store.
2. Choose another item that your customers may want to purchase. Then come up with a list of things that you will need to know to help them narrow the field. Share your ideas with a group, if possible. Write down other needs the group comes up with.

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<th>ITEM:</th>
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<th>NEEDS / OTHER INFORMATION:</th>
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Get into pairs. If this is not possible, then ask your instructor to do this activity with you. The instructor will provide a plastic cup for you for this activity. One person will be The Company. The company’s job is to sell a plastic cup to the other person who will be called The Consumer.

The Company is retail. The Consumer walks into the store. The Consumer is the type of customer who wants all the details. The Company’s job is to give The Consumer all the details about the plastic cup and to try to get The Consumer to buy the product. Sell The Consumer the cup!

**For The Consumer:**

3. Did The Company know the product? Did they tell you anything that you couldn’t see for yourself?

Let’s do this again...

Now switch roles. The new person will be The Company and will now sell the plastic cup to the new consumer. Next, fill out the above questions as if you are now The Consumer.
Below is an example of all the details that could be included when selling something which seems as simple as a plastic cup!

“I understand that you are thinking about purchasing a cup today. Well, our cup is made from durable plastic that has been tested to make sure it will not crack from heat or cold. That means that you can drink hot chocolate or cold milk in this cup. Most plastic cups are designed for cold beverages only. Who will be using this cup?

Oh, you have children. Well, there are no worries with our cup. It is completely shatterproof. Our cup is completely dishwasher safe. There are some plastic cups on the market today that cannot go into the dishwasher. This means even if you have the convenience of a dishwasher in your home, you would still have to wash those cups by hand...not very convenient. Do you have a particular colour in mind?

Our cup comes in 52 different colours. I am sure one will match your colour scheme. Now, have you thought about health issues?

This glass holds 8 oz. of liquid. If you keep this cup by your sink, and refill it 8 times, you will reach the recommended daily intake of water. You can drink your way to better health with this cup! Do you have any questions?

No?

You’d like a set of 8?

Wonderful choice...now what colour would you like?”
Ask yourself the following question. What are you going to do to “know your product”?

Somewhere in your store, you will hopefully have what the customer needs. Your job is to find it and present it to your customer. Knowing your product and explaining the benefits of using your product is your selling equation!

4. Remember back to the many details of the plastic cup and all of the different facts about the cup that were listed. Using the plastic cup as the item you are selling, fill in the fact section of the following table. When all the facts are listed, fill in the second half of the chart. Remember, this is your selling equation while you fill out the chart!

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<th>FACT</th>
<th>IMPACT ON THE CUSTOMER</th>
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<td>durable plastic</td>
<td>will not crack in heat or cold</td>
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</table>
5. Think about the selling equation, and how the features of items or services you sell make an impact on customers. If possible work in pairs, if not work on your own. Decide on an item to sell. It can be anything that is a retail item. Write out the facts and how it would sell the customer. Use the table below.

Item we are selling: __________________________

<table>
<thead>
<tr>
<th>FACT</th>
<th>IMPACT ON THE CUSTOMER</th>
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Commitment to Customer Service
Part 2

Customer Service Tips

The following are some important dos and don’ts when dealing with customers.

<table>
<thead>
<tr>
<th>Do</th>
<th>Don’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Practice good listening skills</td>
<td>• Be overly friendly or familiar</td>
</tr>
<tr>
<td>• Make a positive connection</td>
<td>• Talk about their or your personal problems</td>
</tr>
<tr>
<td>• Be honest and helpful</td>
<td>• Gossip</td>
</tr>
<tr>
<td>• Always follow through on your promises</td>
<td>• Use inappropriate language</td>
</tr>
<tr>
<td>• Keep calm at all times</td>
<td>• Attack when being attacked</td>
</tr>
<tr>
<td>• Be courteous and polite</td>
<td>• Make promises you can’t meet</td>
</tr>
<tr>
<td>• Make customers feel important</td>
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<tr>
<td>• Keep your conversations professional</td>
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</tbody>
</table>

*Source: Adapted from 9 to 5 Magazine for Administrative Professionals, Vol. 2, Issue 1, Spring 2000.*
Learning Activity #9

Remember to write in complete sentences and check for correct spelling and grammar!

1. Think back to what you have just learned in Commitment To Customer Service, Part 1. What would you add to the list of dos and don’ts above?

2. Use each of the following words or phrases in a sentence. Make each sentence about retail. You can use a dictionary, if you wish. Remember to use the correct form of the verb.

- Talk
- Chat
- Gossip
- Talk shop
- Talk your head off
- Talk down to
- Follow through
- Follow up
- Polite conversation
- Personal problems

1.

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3. Which of the words or phrases listed in the box on page 44 are appropriate or inappropriate ways to relate to a customer? Explain why or why not.
What is Customer Service?

Customer service is any contact between a potential customer and an employee. With good customer service, the contact results in a positive experience. Customers want good customer service or, better still, excellent service. They want an employee to listen to them politely with full attention. They want a quick response, but a thoughtful one. They do not want to be ignored or made to wait while the employee is speaking on the telephone. They want to be helped to reach their goal, whether it is buying a new television or an ice cream cone. Customer service is part of all business and service delivery operations. As a retail associate, every action you make makes a difference to the experience of the customer!

Source: CanadaWorks

Potential Customers

Before you begin to work in the retail occupation of your choice, you need to identify your target audience. You need to have an idea of who will be the buyers. Do market research to find out who the potential customers might be in the retail area where you plan to work.

For example, if you plan to work for an upscale boutique, you need a certain “look”. Customers have certain expectations about the sales staff regardless of the sales sector. You need to research the dress, attitude, language and appearance of people doing the work you are interested in. You also need to establish excellent customer service by providing friendly, professional and knowledgeable service. Dealing with complaints efficiently and smoothly is another important skill necessary to work in any retail environment.
Learning Activity #10

Remember to write in complete sentences and check for correct spelling and grammar!

1. What are three characteristics of good customer service?

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2. In your opinion, what are three sure ways to lose a customer? Explain why.

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3. Do you have good customer relations skills? Give an example that proves it.

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4. Retail associates do a number of tasks related to customer requests. In these examples, you will have to develop the correct questions and answers for the different situations. The following is an example.

- The customer wants to return a sweater
- Ask for the receipt
- Ask for the reason it is being returned
- Too large
- Ask for the customer’s information to put on the return form
- Don’t forget to smile and say come again or something equally polite

Dialogue:

Customer: Excuse me. I would like to return this sweater.

Retail Associate: Do you have your receipt?

Customer: Here it is.

Retail Associate: Thank you. I need to make note of why you are returning the item.

Customer: It was really the wrong size…much too big. I didn’t try it on until I got home.

Retail Associate: Oh! We actually just received a lot of beautiful new sweaters this morning and all the sizes are available. If you’d like, after I process this return, I could show you where they are.

Customer: Sure, I do have a few extra minutes to spare.

Retail Associate: Okay. Would you please fill in your name and address on the receipt. Thank you. Here is your copy. And I’ll show you the new sweaters now!
Notice that in the above example, instead of only processing the return, the retail associate showed interest in the fact that the sweater was too large and provided excellent customer service by offering to show her the new sweaters after processing the return.

Now try the examples below. Remember, your aim is to provide excellent customer service!

a.
  • make a payment on their credit card
  • verify the amount and credit card
  • give receipt
  • talk about the special event in the store…a fashion show
  • thank you

Dialogue:
b.

- potential customer looking in the windows of a car on the lot
- greetings
- chat
- product information
- setup a test drive

Dialogue:
c.
- looking for a new toaster
- questions about type of toaster
- price range
- locate for customer
- complete purchase

Dialogue:
d.  
• making a purchase  
• asks about discount card  
• tell information; 10% off all items for one year and cost $5.00  
• decides to join  
• fill out application  
• goodbye greeting

Dialogue:

Find a partner and practice the above dialogues in a role-play.
The Customer Wish List

1. They want it to cost less, even if the price is fair.
2. They want it faster/immediately.
3. They want it to come to them…delivered.
4. They want it to be upgraded or replaced automatically.
5. They want it even before it is available.
6. They want it customized to fit their special requirements.
7. They want it to come pre-assembled and ready to run, no instructions or thinking required.
8. They want to be able to return it with no hassle.
9. They want it to work better than advertised.
10. They want to feel good about being your customer.

Source: Adapted from sbinformation.about.com

The last word…

- 98% of unhappy customers never complain about rude behaviour
- 90% will never come back to the company
- Each will tell their story to nine or more people…

You do the math!
Learning Activity #11

Remember to write in complete sentences and check for correct spelling and grammar!

1. Think about a company you have worked for or are familiar with as a customer. Are any of the items on the “customer wish list” realistic? Explain why.

2. Do you think the facts in the above box titled “The last word…” are correct? Explain why or why not.

3. What impact could these facts have on the bottom line of the company you work for?
4. What can you do as a retail associate to make sure this doesn’t happen?

---

**Essential Task**

The essential task of every retail sales associate in any job is to make the sale and complete the transaction. The process for doing this is different in different companies or sales occupations. It is also a matter of personal style.

Companies rely on their sales force to sell the product, whether it is a candle, a sweater or a stereo. It is helping the customer to the point where they say yes to the transaction itself. There are tips that are useful in any sales transaction. The following are some helpful tips:

- **Know your customers’ needs.** Ask the right questions. Make sure the product or item is right for the customer. For big-ticket (expensive) items, this is often obvious. With a smaller item, for example, a sweater that is the wrong size or colour, staff may make the mistake of thinking it will not cause any harm to sell it anyway. Do you think the customer will return to buy from you again?

- **Know your product.** Keep up to date with your company’s trends and new products that are coming in to the store. It is important to know everything that is for sale in your store. This may take time, but it will help you to be able to help your customer find what they are looking for or need.

- **Listen very carefully to your customer.** Sometimes you can read between the lines and find out what a customer really wants!

Personality and style has an impact on the success of a deal or transaction.
Are you a hard sell or soft sell performer? Are you able to be caring; do you smile and make eye contact; do you have a firm handshake? Can you stay focused on the sale; think on your feet and most of all, never lose your temper? The saying “The customer is always right” is all about selling.

There are also various rules about transactions. Each company will have different rules which you need to follow and tell your customers about. For example, you need to know if a sale is a final sale when it is on the reduced/clearance section of the store. Be certain to tell your customer at the point of sale that they are purchasing an item which is a final sale and cannot be returned.

Different conditions for a return or an exchange will vary. For example, in one company, the customer may purchase an item which can be returned with the receipt within two weeks of the sale. The length of time for returns varies from company to company. Whether the customer gets a credit to use on another item in the store or full money back is also up to the company you work for. As a retail associate, you need to be able to tell your customers these important types of information. And always remember to pass on this information in the most friendly and pleasant manner. Your customer will appreciate knowing such things!

**The Four Steps of Selling**

Selling involves four separate steps no matter what the product is. They are the following:

1. Approach the customer
2. Discover needs
3. Present goods
4. Close sale
Learning Activity #12

Remember to write in complete sentences and check for correct spelling and grammar!

1. What is the essential task of any retail associate? Explain why.

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2. What are three tips to remember in any sales transaction?

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3. What are two rules regarding sales transactions, which will differ according to which retail company you work for?

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4. Do you need to tell customers the various rules regarding sales transactions? Explain when and why this is important.

5. If possible, work with a partner. Look at the four steps of selling. Decide what each of these steps means to a retail associate. One person will be the customer and the other will sell. Decide on a product. Write a script of what each of you might do or say in each of the four steps in the selling process. Use the lines below. If you need to work on your own, be the seller.
6. In your opinion, which is the most difficult step to complete? Explain why.
7. Read the following sentences and circle T for true statements and F for false statements.

T  F  1. Knowing your product is an important part of the sales transaction.

T  F  2. Customers can always get cash back when they return an item.

T  F  3. The transaction is the least important task in sales.

T  F  4. Listening carefully is critical in sales.

T  F  5. A customer will always return to the same sales associate.

T  F  6. A sales professional needs to believe that the customer is always right.

**Time Management And Customer Service**

Most people know that customer service is one of the most important parts of working in retail, if not the most important! However, as a retail associate you will have many other job tasks during your workday, which you will be expected to do. Keeping customers as your priority at all times is the important point. This is why time management becomes so important during your day, and even before you begin your workday! Below are some very important steps about how to manage your time.

**The First Step**

The first step is to *always be on time for work*. It is a good idea to be at work at least fifteen minutes early. Often, the silliest and smallest things may come up just before you go to work, which may lead to being late. Maybe the bus arrives late, or you get a really important phone call that you need to answer, or you get stuck in a snowstorm, or you have misplaced your keys.
We have all experienced such things and the only thing we can do to prevent such mishaps is prepare to begin work early, so that regardless of what “disasters” come our way, we can still arrive at work on time. Beginning work at least a few minutes early helps you to focus on what your tasks are for the day, and you will begin your day calmer and clearer.

The Second Step

Keep your work area tidy. If you have an assigned cash register, or work on a shared one, make sure that the area around it is tidy and clean. Do not leave lots of clutter around. This is not the image you want your customers to see. Your frustration will also increase if you cannot find that important message you have to give to your manager.

Get rid of any old lists or messages you no longer need. Set up specific sections in your front desk or drawers. For example, a section for your pens and sticky notes, a place for your calculator, stapler and paperclips, a section for any returns or exchanges you process within the day, a section for coupons received, another section for important notes to yourself, etc. You will be surprised at how well you can keep track of things, such as what you need to do next and where certain items are to complete, when you have an organized work area.

The Third Step

Keep a list of what you must do during your day. Most companies you work for will have certain tasks which must be completed on a regular basis. For example, a list of cleaning which must be completed each week might hang on the back room door. Each staff member may be expected to do two jobs from the list one week, and two different jobs on the list the next week. There may also be very specific opening and closing activities, which must be completed at the beginning of the day and at closing.

Make your own specific list of things, which you must complete during your workday as a retail associate. Then finish this list with things you hope to get done, if time permits. Remember, keeping busy and focused on work tasks makes an employee that every supervisor will notice and value.
The Fourth Step

The fourth step is to ALWAYS remember to stop whatever task you are doing when a customer either comes into your store or approaches your work area, and give them a friendly greeting.

If you work in a small store, it may be company policy that you greet customers within thirty seconds of the customer entering the store. At first, this may seem like a high expectation, but it is easy to do and makes a more pleasant day for your customer and for you. Think of your store as your home. Would you ever ignore or not greet a guest who walked into your home? It is the same idea when a customer walks into your store. You must acknowledge the customer and show them you are happy that they have decided to shop here.

If you work in a larger store, it may be company policy that you greet each customer. Remember that a greeting includes simple gestures such as a smile, friendly eye contact, a hello, or a nod if you are busy with another customer.
Learning Activity #13

1. What is the first step in time management? Explain the importance of this step.

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2. What is the second step in time management? Explain the importance of this step.

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3. What is the third step in time management? Explain the importance of this step.
4. What is the fourth step in time management? Explain the importance of this step.
Telephone Service

The Telephone

When a customer calls, your voice represents the whole business. To the caller, you are the business! How you handle the call can win the customer over for life, or send them in search of another company. The caller needs you to be effective and efficient.

Find out how to best help the caller in the fastest way possible. The caller and her needs are your job. Always remember that a phone call is not an interruption.

First impressions are lasting impressions.

When you meet someone for the first time, you leave an impression - good or bad. When you meet someone on the phone for the first time, you also leave an impression. The impression also tells the customer something about the company you are representing. The person to whom you are speaking cannot see your facial expressions or read your body language. They rely on what they hear to form an impression about you and your company. Your tone of voice, manners, use of words, and speech patterns all help the caller form an opinion of you and the retail company you work for.

You will want to:

- be polite and pleasant
- use an appropriate volume
- don’t talk too fast
- pause when giving information
- sound interested
- emphasize appropriate words
- speak in a calm voice
- keep your pitch low
Be polite and pleasant.

To be sure that you are being polite and pleasant, listen to your voice as you are speaking. Do you sound friendly? Try smiling when you answer the telephone.

“A smile on your face is a smile in your voice!”

Just because the customer on the telephone can’t see your smile doesn’t mean they can’t hear it!

Use an appropriate volume.

Almost everyone can recall a time when they have spoken to someone on the phone, and actually had to pull the receiver away from their ear to avoid a loud caller’s voice. Sometimes, people across the room can hear the conversation word for word! This is something to remember when using the phone. Speak in a normal tone and in a clear voice. If you suspect that the caller may not be able to hear you, ask if they would like you to speak a little more loudly. For example, “Would you like me to speak up a bit, Mr. Jones?”

Keep in mind the type of phone that is being used. Cell phones and cordless phones sometimes have poor reception.

Use a moderate rate of speed.

If using the phone is a regular part of your day, you may find that you are repeating the same information several times. It almost becomes second nature, and you can do it without really thinking about it. However, we tend to speed up when we are reeling off information we know so well. We must remember that even if this is the tenth caller today who has asked when the store opens and closes, it is the first time the caller is hearing it.
For example, “We are open from 9-5 every weekday and 9-9 on Saturdays.” is not helpful or sending a positive image of your company.

Nervousness can also lead to speaking quickly. Some people get nervous and rush through the phone call to get it over with faster. They don’t like talking to strangers. To help make it easier for you, take a deep, calming breath before answering the phone, and then speak at a moderate rate of speed (normal to slow) when talking to the caller.

If you are in the middle of a conversation and you realize that you have been speaking quite quickly, ask the caller if she needs any of the information repeated or clarified, or if she has any questions. Then repeat the information more slowly.

Practice your telephone voice with a friend or co-worker. Often we cannot tell how fast or slow we are talking. You want to speak slowly enough so that the caller understands you, but not so slowly that it makes it hard to listen to.

**Did you pause when giving information?**

If you are giving information that the caller may want to write down, remember to pause after each section. You may want to tell the caller you will be giving a number, address, catalogue number, and name, so the caller can get a pen and paper.

For example, “I have the number you need, Mrs. Smith. If you would like, I could wait while you get a pen and paper to write the information down.” Or “The name of the person you need to call is Joan Kettle. (pause) K-E-T-T-L-E. (pause) Her number is (short pause) area code 489 (pause) 3-5-6 (pause) 3-7-4-2.

**Sound interested.**

The caller will hear disinterest in your voice. Let the caller know that she and her situation are your first priority.
Watch the **inflection** in your voice.

Inflection:
- let your voice rise and fall naturally.
- For example, when you ask a question, your voice rises at the end, “Would you like me to gift wrap that for you?”

Some people have learned a particular speech pattern where their inflection rises at the end of every sentence. A lot of people find this particular speech pattern annoying and difficult to listen to.

If you have this pattern, you may want to practice speaking without it. With some practice, you can learn a new speech pattern.

**Accent important words.**

Choose important words or phrases to accent. For example, the following paragraph has in bold the words that might best be stressed. “This **particular** model is **very** economical. It has a built-in feature that measures and records the water levels needed. **It also has a memory sensor** that will allow it to repeat these water levels. This saves you both **time and money**. This feature is **only available** with this model. **No other company** has this new technology.”

**Speak in a calm voice.**

Remain calm no matter what the situation! If you become upset or anxious and it shows in your voice, no one will be able to understand you, and you will lose the confidence of those around you.
Keep your pitch low.

If you speak in a high-pitched voice, you may want to make an effort to speak in a lower pitch. Lower tones carry much better over the telephone.

Learning Activity #14

1. How does your telephone voice rate? Find a partner. Take turns reading the following paragraph. Rate yourself, and your partner, as you read. Use the evaluation form on the next page.

As you rate yourself and your partner, remember to show respect and be honest. This will help you and your partner have a better understanding of what your voice sounds like to others.

Hello, this is Wanda from Camden Books calling for Mrs. Burton. Hello, Mrs. Burton, how are you today?

I’m fine, thank you. I am calling to let you know we just received a shipment of books, and the book, “The Tidal Wave”, that you ordered is in. Are you still interested in purchasing it?

Wonderful. We will keep it behind the front desk until you are able to stop in to pick it up. Now, Mrs. Burton, I have also received our newest catalogue and I see that one of your favourite authors has just come out with a new book called “Once There Was a King.” If you are interested, it will be in next Thursday.

Yes, I agree Mrs. Burton, the price of hardcover books has risen over the years. I could put your name in our computer system, and call you as soon as it comes out in paperback. Let me just double-check the spelling of your last name...it’s B-u-r-t-o-n?

Wonderful. I will call you as soon as I know the paperback release date. I appreciate your business, Mrs. Burton, and if there is anything else we at Camden Books can do for you, please don’t hesitate to ask. Have a nice day Mrs. Burton. Goodbye.
## Evaluation Form

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<tr>
<th>Self-Evaluation</th>
<th>Partner’s Evaluation</th>
<th>QUESTIONS TO ASK YOURSELF</th>
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2. Were you surprised by your own evaluation? Explain your answer.

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3. Were you surprised by your partner’s evaluation of you? Explain your answer.

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4. Describe the differences between our everyday speaking voice and our professional voice.

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Telephone Etiquette

Helpful Hints:

• Business calls should be made during business hours. The hours vary depending on the type of business, but generally, you should not call someone before 7 a.m. or after 9:30 p.m. Avoid making calls during mealtimes.

• When placing a call, give your name to the person who answers the phone.

• When you are calling someone who is at work, even if your call is work related, keep your message short and to the point. Respect the fact that their time is valuable and try not to take up large chunks of it every time you call.

• When answering calls, don’t let the phone ring more than 3 times.

• Tell the caller who you are when answering. For example, “Camden Books, Wanda speaking”.

• Avoid distractions. Don’t try to do other things while you are talking to a customer. Just because they can’t see you doesn’t mean that they can’t sense that you are not giving them your full attention.

• Do not eat, drink, or chew gum while talking on the phone. It sounds horrible.

• Speak clearly.

• Be helpful...all the time.

• Say good-bye at the end of a conversation. Avoid bye-bye, or later.

• Let the caller hang up first.
Telephone Anxiety...

This can happen when we feel anxious or nervous about talking on the phone. We don’t want to talk to strangers or customers. We are worried about getting information wrong, or not knowing what to say.

A large number of jobs involve talking on the telephone, so this is something that can stop us from doing jobs that we otherwise would enjoy, or be very good at.

Learning Activity #15

Remember to write in complete sentences and check for correct spelling and grammar!

1. Think about the term “telephone anxiety”. What is it? Do you have it?
2. Why are we afraid or anxious when using the phone? Use the space below to record your ideas and thoughts.

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3. What are some ways to overcome telephone anxiety? If possible, talk it over with a partner and write some suggestions below. If not, work on your own.

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________________________________________________________________________
How Can We Overcome Telephone Anxiety?

1. Be prepared! Have a pen and message pad available. Use the commercial message pads that are made for telephone messages. Fill in all the blanks and you will have covered all the important information.

2. Speak slowly and clearly.

3. Practice. Ask a friend to help you. Write down what you need to say. Knowing what you are going to say takes a lot of pressure off.

4. Imagine you are the customer. Why would you be calling the business? What might you want or need to know? Take the time to learn important information and names of people in your organization. Have this information on hand. Create a sheet of information that you keep handy. This may include a price list, your company history, the names and extension numbers for staff; whatever people are asking about.

5. If you are unable to answer a question, take the caller’s name and number, find the information, and call the customer back right away. Then add this information to the sheet mentioned above. Next time someone needs this information, you will have it.

6. If you will need to transfer calls, find out who does what on your staff and keep this handy. For example, “Jane in accounting can help you with that, Mr. Jones. I’ll transfer your call to her desk. If you’d like to write her extension number in your phone book for future reference, it is extension 4321.”

What To Say...And How To Say It.

Identify yourself.

Whether you are calling someone, or answering incoming calls, give your company name and your name right away.
Why identify yourself?

If you are calling someone, identifying yourself lets them know who you are and what company you are calling from. This helps them to know why you are calling.

Use your first and last name. You are probably not the only “Susan” they know!

If you are answering an incoming call, identifying yourself and your company lets the caller know right away if they have reached the correct number and to whom they are speaking.

Suggestions for Answering the Telephone.

Often, the company you are working for will have a specific way that it will want you to answer the telephone. The following are some examples of ways to answer the phone that are both professional and provide all of the necessary information for the caller:

- “Good morning. Spy Glass Enterprises. Mary Jones speaking.”
- “Spy Glass Enterprises. Mary Jones. How may I direct your call?”
- “Good morning. Spy Glass Enterprises. Mary Jones speaking. How may I help you?”

The following are some suggestions for placing a telephone call to a customer:

- “Hello. This is Mary Jones from Spy Glass Enterprises. I am calling for Tom Lamb. Is he available?”
- “Good morning. May I speak to Tom Lamb please?”…“Thank you.”…“Hello, Mr. Lamb. This is Mary Jones from Spy Glass Enterprises.”
While You Were Out ... The Art Of Taking Messages.

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<th>To</th>
<th>□ URGENT</th>
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<td>Date ____________________</td>
<td>Time _____ AM PM</td>
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**While You Were Out**

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<td>Area Code Number Ext.</td>
<td>________________________</td>
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<tr>
<td>Fax ______________________</td>
<td>Area Code Number Ext.</td>
</tr>
<tr>
<td>Telephoned</td>
<td>Please Call Again</td>
</tr>
<tr>
<td>Came To See You</td>
<td>Wants To See You</td>
</tr>
<tr>
<td>Returned Your Call</td>
<td>Will Call Again</td>
</tr>
</tbody>
</table>

Message:

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Signed: ____________________________

When you are taking a message, it is very important to make sure you have all the information. You can buy message pads in most stationery stores. These pads help you to record all the necessary information. If you have all the areas on the pad filled in, then you have all the information you need.
Message pads come in different styles. Some come in a notebook, so when you write the message it is transferred to the sheet below it. This allows you to keep a record of messages, in case the slip of paper is lost, or you need to flip back several months to find a name or number. This is very handy.

**Take A Message, Please.**

If answering phones is part of your job, then so is taking messages. There are times when people are away from the office, or simply unable to come to the phone. You will need to take a message.

```
Taking Messages:
- your first job is to provide complete and accurate information
- your second job is to be certain the message is given to the right person
```

Most commercial message pads have spaces that include the following information:

- **Who is the message for?**
  
  Write the name of the person that the message is for on the message itself, so as to avoid confusion or a mix-up.

- **Date and time.**
  
  Perhaps the message is for a person who will be away for several days. They need to know when people called them.
• **Is the message urgent?**

   If the message is an emergency or very important you need to check the box marked urgent. Not all message pads have this box. If the message pad you use does not have this box, then write “urgent” in the message area. You may want to write it in large red letters.

• **Who is the message from?**

   Write down the caller’s first and last name. Ask for correct spelling. If the name is unusual, you may want to write down what it sounds like. For example: Miss Smythe - pronounced Sm-eye-th. Although people with unusual names are used to people saying their name wrong, it is a good opportunity to show them that they are valued customers...and getting their name correct is important to you!

• **What company is the caller with?**

   Write down the name of the business or customer. You may want to include something about the business. For example, Smith & Jackson Inc. does not tell you a lot about what they do. If, during the conversation, they mention that they sell office supplies, you will want to add this to the message. For example, Smith & Jackson - office supplies. This helps the person who will be returning the call understand what they were calling about.

• **Where can the caller be reached?**

   Ask for the caller’s phone number, fax number if necessary, area code, and extension.
• **Action.**

    Usually on commercial message pads there is a space to check off what happened (telephoned, came to see you, returned your call) and what they want done (please call, wants to see you, will call again).

• **What is the message?**

    Be brief, but make sure you get all the details.

• **Sign your name.**

    The person receiving the message may need to ask you a question about the message.

---

**Learning Activity #16**

How well do you take messages? Work with a partner. If you are unable to get a partner, then be certain to have the instructor do this activity with you. It is an important exercise and should not be missed!

If real telephones are available, each pair should have at least one phone. If there is only one, the person who is taking the message should use it. You will need to be able to write a message and hold onto the phone at the same time. Decide who the caller is and who the message taker is. You will have an opportunity to switch positions so that each person can practice taking a message. Use the message pads on the following pages. Remember what we have just learned about taking messages. Try to follow those instructions.

**Instructions for the caller:**

Read the following situations below. Choose at least three of the following or make up your own. Do not tell your partner the details until you are “on the phone” with them. Make up names and any other details you would like.
• You work at a computer store. You are returning a call about an estimate for fixing a computer.

• You are calling to tell a customer that your boss cannot make it to a meeting with them, and would like to make another appointment for next week.

• You are calling to talk to Mrs. or Mr. Smith and would like him/her to call you as soon as possible. You leave several telephone numbers and times when you can be reached.

• You are calling to set up an appointment. You leave a date and time and ask that the person you are meeting call you back to confirm the date.

• You are calling your doctor and you want her to fax you the results of the tests you had done recently. You need it right away.

• You are calling your workplace to tell them that you are ill and unable to come in to work today. You have a doctor’s appointment this afternoon. You will call your boss after you see your doctor.
To ________________________  □URGENT

Date ________________ Time __________ AM  PM

While You Were Out

From _____________________________________
of ________________________________________
Phone ____________________________________
   Area Code   Number               Ext.
Fax _______________________________________
   Area Code   Number                Ext.

<table>
<thead>
<tr>
<th>Telephoned</th>
<th>Please Call Again</th>
</tr>
</thead>
<tbody>
<tr>
<td>Came To See You</td>
<td>Wants To See You</td>
</tr>
<tr>
<td>Returned Your Call</td>
<td>Will Call Again</td>
</tr>
</tbody>
</table>

Message:

___________________________________________
___________________________________________
___________________________________________
___________________________________________
___________________________________________

Signed:    ___________________________________

© LLEO 2004, Retail Essential Skills Training
To ______________________  □URGENT
Date ________________  Time __________ AM  PM

While You Were Out

From _____________________________________
of ________________________________________
Phone ______________________________________
   Area Code   Number               Ext.
Fax _______________________________________
   Area Code   Number                Ext.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Telephoned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Please Call Again</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Came To See You</td>
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<tr>
<td></td>
<td></td>
<td>Wants To See You</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Returned Your Call</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Will Call Again</td>
</tr>
</tbody>
</table>

Message:
___________________________________________
___________________________________________
___________________________________________
___________________________________________
___________________________________________
___________________________________________

Signed: ____________________________________

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From: Customer Service…it’s more than just “Thank you, come again!”

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Out to Lunch.

If you answer the telephone and the call is for someone who hasn’t returned from lunch or is not taking any calls, how do you respond and make a positive and professional impression?

Avoid negative responses.

“Mr. Jones is still out to lunch. I will have him call you as soon as he returns.”

- The use of the word still makes it seem that Mr. Jones has been out to lunch for a long time.

- If for some reason Mr. Jones is unable to return the call until later in the afternoon, the caller is going to think:

  a) Mr. Jones takes very long lunches.

  b) Mr. Jones has better things to do than call me. I am not important to him or his company.

“Mr. Jones is not taking any calls this morning.”

- The caller immediately feels that he is not important to Mr. Jones or his company.

Offer alternatives.

“Mr. Jones is in a meeting. Could I take a message or transfer you to another department?”

“Mr. Jones is in a meeting. Mrs. Smith is taking his calls. Would you like me to transfer you to her office?”
Learning Activity #17

1. The following conversations have taken place in your office. Decide if the employees are using good telephone manners. Mark the yes box if you think it is an example of good manners and the no box if you think it is an example of poor telephone manners.

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
<th>CONVERSATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1. “Hi. How’s it goin’? How can I help you?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. “What?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. “You want me to look up that number for you? Don’t you have a phone book? If you look under computers you’ll find it.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. “Yes. Can I do something for you?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. “I can put you through to Mr. Jones. He handles all general inquiries. Can I put you on hold?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7. “Thank you for calling South Bay Computers, Mrs. Smith. I am glad that we could help you. Please call us again if there is anything else we can do for you.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8. “Christine can’t come to the phone. She’s busy. You can call back later. Thank you.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9. “I’m going to put you on hold. Someone will be right with you.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10. “Mrs. Brown is not in the office at the moment. May I take a message?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11. “Hold please.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>“Let me repeat that address for you, Mrs. Forest. It’s...”</td>
<td></td>
</tr>
<tr>
<td>13.</td>
<td>“Ms. Green is on lunch break. She’s usually about 10 minutes late, but I can have her call you as soon as she returns, Mr. Jones.”</td>
<td></td>
</tr>
<tr>
<td>14.</td>
<td>“Are you aware of our Customer Savings Option Plan? If you have a few minutes, I could explain the benefits to you.”</td>
<td></td>
</tr>
</tbody>
</table>

2. Choose two examples that you marked as examples of good telephone manners and explain why below.

a. 

b. 

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3. Choose two examples that you check marked as poor telephone manners and explain why below.

a. 

b. 

What Do I Do Now?

The Dilemma...

“I have a customer in front of me and one on the phone...who do I serve first?”

This is a common problem for anyone who works in customer service. The last thing you want to do is send someone off to another place of business. How do you keep both people happy?
Learning Activity #18

Remember to write in complete sentences and check for correct spelling and grammar!

1. If you had a customer in front of you as well as one on the phone, what would you do?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

2. Why? What do you need to think about?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

3. What would you say?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Things To Consider.

There is no easy answer to this situation. There are so many things to consider:

- what type of business do you work for?
- are there other staff who could answer the phone?
- does the customer seem to be okay with you answering the phone?
- how many interruptions have you had while serving this customer?

Most customer service professionals, as well as your boss, would tell you that you must answer the phone. You never want to miss a chance to bring in another customer.

Because of this, you need to consider the following:

- Before you leave to answer the telephone, politely ask the customer if they mind if you answer the phone. For example say, “I’m sorry. Do you mind if I quickly answer that and take a message?” Most customers will not mind and will, in fact, appreciate your courtesy. Remember to be polite and show respect for the customer.

- When you answer the phone, quickly find out what the caller needs and decide how you will handle the call. If the caller simply needs a question answered, for example, “How late are you open?” you can quickly answer the question and return to the customer in the store. If the caller needs more time or information from you, for example, “Could you tell me the make and model number of the washing machine I looked at last week?” you may want to ask if you could call them back.

- Is it possible to answer the phone, take a message and return the call as soon as possible? For example, “I’m sorry. I am with a customer right now. Your business is important to us, so could I take your name and number and I will call you back?”
• Return to the customer and thank them for waiting. For example say, “Thank you for waiting. I appreciate it.” Look after your customers’ needs. Do not make them feel rushed now that you have a call to return.

• If you have a call to return, do it as soon as you do not have a customer.

**Learning Activity #19**

Remember to write in complete sentences and check for correct spelling and grammar!

1. You are filling in for the customer service receptionist over the lunch hour. Your manager is having lunch in her office, and has asked not to be disturbed, unless it is an emergency.

How do you handle this situation?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. A customer is on the telephone and is very upset about something. He wants to talk to someone now. The customer tells you he has called and left at least two messages earlier that day. He is very upset that no one has returned his messages.

How do you handle this situation?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
2. You are busy with a customer when the telephone rings. You have asked in a polite manner if you could quickly answer the phone. The customer is very pleasant and told you not to hurry. You answer the telephone, and after your professional greeting, the caller states, “Oh, I’m sorry, I have the wrong number.”

How would you respond?

3. Have you ever called a business and heard, “Hold please,” without being allowed to say anything before you were placed on hold? How did you feel?
Module: Customer Service  Unit: Telephone Service

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4. What would be a better way to greet the customer when you must put them on hold?
The Upset Customer

Learning Activity #20

Remember to write in complete sentences and check for correct spelling and grammar!

1. Customers stop buying from a particular business for the following six reasons. Using 1, 2, 3, 4, 5 & 6 to rate most important to least important, mark the following:

- _______ Die
- _______ Move away
- _______ Form other interests
- _______ Go to the competition
- _______ Are unhappy with the product
- _______ Were served by someone who was rude or indifferent to them

2. Explain why you made the above choices.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

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The study showed that customers stop buying from a business for the following reasons:

6  Die
5  Move away
4  Form other interests
3  Go to the competition
2  Are unhappy with the product
1  Were served by someone who was rude or indifferent to them

3. Have you ever been served by someone who was rude or indifferent to you? Describe the situation.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
4. Think of a time when you were faced with an upset or angry customer. Explain the situation. Why do you believe they were angry, how did they act, how did you handle the situation, and what was the end result? If you have never experienced this situation, then make up one! Remember to write in complete sentence form.

My “upset or angry customer” situation:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Why I believe this customer was upset or angry:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

How they acted:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

How I handled the situation:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
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The end result:

Customers Could Be Upset Because…

- You or someone at your business promised something that was not delivered.
- They were already upset at someone or something else.
- They are tired, stressed, or frustrated.
- They feel like a victim - not much power in their lives in general.
- They feel no one will listen to them unless they yell.
- You or someone in your business was rude, indifferent, or impolite.
- They were told one thing by one staff member and told something else by another.
- They didn’t feel they were listened to.
- Prejudices: they may not like your hair, clothes, makeup, etc.
- They made a wrong assumption as to what your business could do for them.
- They were told they had no right to be angry.
- They were given a smart or flip reply.
- They were screened on the telephone.
- They were embarrassed about doing something incorrectly.
- Their integrity or honesty has been questioned.
- Someone in your business argued with them.
Upset Customers Want...

To Be Taken Seriously

Customers do not want a response like, “You’re kidding!”,”No way”, or “You have to be joking!” They want you to be professional and confident, and to respond seriously to their concerns.

To Be Treated With Respect

Upset customers do not want you to look down on them. They do not want to feel that you are thinking that you are a better person than they are. They want you to treat them and their concerns with respect. This may be difficult when customers are clearly at fault but are trying to blame your organization.

Immediate Action

Customers do not want you to look into it next month, next week, or even tomorrow. They want you to do something now. Show your concern by moving quickly to resolve the problem.

Compensation

Customers want someone to pay for the damage done, and perhaps their time, inconvenience, or pain.

Someone To Be Reprimanded Or Punished

Make sure customers know that action will be taken, even if you are not the supervisor. Report the incident to the supervisor so he can explain the problem to your co-workers and avoid similar problems in the future.
To Clear Up The Problem So It Never Happens Again

Sometimes, customers just want to know that some action has been taken so that no one will have this problem again. Make sure they know you will report the problem to the person who can take care of it.

To Be Listened To

What upset customers want first is to be listened to. It is difficult to listen carefully in tense situations.

Dealing with Angry Customers…

If you deal with people at your work, you will probably run across angry or hostile customers. This is never an easy situation to deal with, but by following a few simple tips, you can make the situation as productive as possible.

Prepare yourself to be sworn at, made fun of, made to feel scared, threatened, or harassed. Unfortunately, it seems to be part of working as a customer service professional. Customers come in all shapes, sizes, and with various temperaments.

It is not a good idea to respond to a customer’s attitude with the same kind of behaviour. This will only serve to “fuel the fire”, and may make the situation worse.

However:

- You do need to deal with these angry customers.
- In order to deal most effectively with them, it is important to know why the customers are behaving the way they are.
Why Do People React This Way?

There are many reasons why people get angry at a business, but mostly, it is because they feel that they have not received what they feel is rightfully theirs. The following are some examples:

- the best price
- quality items
- good service
- fast service
- attention from staff

These reasons may make a lot of people angry; however, most people react differently. We may get angry, and verbally let the person know we are angry and dissatisfied with the service we have received or the product that we have purchased. Other customers may choose to stop shopping in that particular store, so they avoid the situation altogether. Still others may choose to react violently and abusively. With each of these people, there is a story behind why they are so angry. Most angry customers have learned when they rant and rave, they often get what they want. They are probably the people who were schoolyard bullies!

Remember:
- Violence is a learned behaviour.
- The attitude is “If I react this way, I will get what I want.” Or “I will scare the person into doing what I want.”

Most people do not act this way...but the ones who do really make it rough for everyone else. Remember that you, as a customer service professional, need to stay calm and act in a professional manner. Your job is to try and calm them down, and if not, then to keep yourself and other customers safe.
To Diffuse Customers’ Anger:

- respond slowly
- help customers feel that they have choices
- do not become angry
- treat customers as individuals and show concern for their needs
- put yourself in their situation

How To Deal With Angry Customers

Don’t Get Angry

You need to stay in control of your emotions. Your anger will only make the situation worse and make customers angrier. It is hard to stay calm when you feel you are being attacked, but if the situation is to be resolved, you need to stay in a frame of mind where this can happen. Remember to:

- breathe deeply and slowly
- stay cool

Anger Is An Emotion That We All Have

Remember that anger is one of the many emotions that we all feel. We have the right to feel angry. Allow customers the opportunity to vent. When they feel like someone has listened to their problem, they are more likely to calm down and talk about a solution.

Why Are Customers Angry?

Usually when customers are angry it is because they are feeling unappreciated and helpless. It is a reaction we have when we feel attacked or wronged. It is your job to try to find out why customers are angry.
The Source Of The Anger

Although angry customers are directing their anger at you; it is not personal. It usually has nothing to do with you as a person. It has more to do with you as an employee of the business they have a problem with. You represent the whole organization and are immediately available to customers.

Anger vs. Aggression

If customers become aggressive, then back away from the situation. Aggression crosses the line from expressing anger, to intent to scare or hurt someone or damage something.

Stay Focused On Solving The Problem

Angry customers are unable to talk about a solution while they are venting. It is your job to stay on track. Keep trying to find an acceptable solution; either a decision to be made or an action that needs to be taken.

Let Customers Know You Understand The Situation

Listen to customers and then state the situation as you heard it. For example, “You are angry because the toaster you bought last week is broken, and you feel it should be replaced. Is that the situation as you see it, Mr. Jones?” This shows customers you have heard their concerns, and they may begin to calm down.
Praise Yourself For Handling The Situation

Give yourself a pat on the back for handling a difficult situation well.

Seek Help When Necessary

Don’t be afraid to call on co-workers to help you handle the situation. Sometimes, just having someone within listening distance is helpful. Unfortunately, angry customers are an everyday part of dealing with people. Don’t take it personally. Just deal with them the best you can, and try and help them resolve their problem. Most important of all, remember: you cannot make all customers happy.

Learning Activity #21

Remember to write in complete sentences and check for correct spelling and grammar!

1. What are three reasons why customers may be upset?

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

2. What are five things that upset customers may want? Describe why.

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
3. Should a customer service professional respond to customers’ upset or negative attitudes with similar behaviour? Explain why.

4. What are five ways to diffuse customers’ anger?
5. What is the difference between anger and aggression? Give an example for each.

6. When should you ask for help from your co-workers? Describe a situation where you would ask for help.
When Anger Changes To Violence Or Abuse

Anger is an emotion that people have a right to express. However, they do not have a right to take their anger out on you. Sometimes, angry customers cross the line and start to make us fearful. Violent or abusive customers will try to:

- make you feel that you are not capable of doing your job
- manipulate you
- make sexist or racist remarks
- swear
- threaten you
- throw things
- give you “the finger”
- stand very close to you

All of these things are used to control you and your actions. Sometimes, the situation will escalate and customers will become physically violent. As someone working in customer service, you need to be prepared for this kind of behaviour and try to avoid it. However, you may still have to deal with abusive customers. They may touch you (grab you by the shoulder, arm, or wrist), shove you, or even worse. Remember, customers like this are rare. In situations like this, your first priority becomes keeping yourself and your other customers safe. If you feel a customer has crossed the line and become violent or abusive and you are afraid for your safety, you need to:

- stay calm!
- get the attention of a co-worker, who may have already noticed the situation
- politely ask the customer to leave
- call the police if necessary

Trespassing notices can be served stating that this customer is not allowed on the premises. Sign it, have a witness when you give it to the customer, and send a copy to the local police station.
Words that make a difference

The words you use with customers can either help communication along or block it. The following are examples of statements that will either “block” the communication with customers or “help” the communication.

<table>
<thead>
<tr>
<th>Use Impersonal Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Blocker</td>
</tr>
<tr>
<td>You didn’t do this right.</td>
</tr>
</tbody>
</table>

If customers do something wrong, point out the mistake indirectly. They may be embarrassed by the mistake. Customers may get angry because of the mistake and try to blame you. Even if customers are wrong, the time to point it out is not when they are angry.

<table>
<thead>
<tr>
<th>Use “I” instead of “YOU”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Blocker</td>
</tr>
<tr>
<td>You’re wrong.</td>
</tr>
<tr>
<td>You’re confusing me.</td>
</tr>
<tr>
<td>Don’t blame customers. When explaining what went wrong, use an indirect approach or “I” statements as much as possible.</td>
</tr>
</tbody>
</table>
Avoid Giving Orders

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have to...</td>
<td>Will you...please.</td>
</tr>
<tr>
<td>Wait here.</td>
<td>Would you mind waiting here while I speak to my supervisor?</td>
</tr>
</tbody>
</table>

People like to be given a choice. Ask customers pleasantly to do something and explain how it will be to their benefit. People don’t like to be given orders.

Take Responsibility

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can’t...</td>
<td>I don’t have the authority. However, Mary should be able to help you. Let me get her.</td>
</tr>
<tr>
<td>It’s not my job.</td>
<td>Let me see what I can do to help. John is the specialist in that area. Let me get him for you.</td>
</tr>
</tbody>
</table>

Tell customers what you can do together; not what can’t be done. If you cannot help, connect the customer with someone who can. Even if the customers’ needs are not within your job duties, never tell them that. Tell them how you can help.
## Avoid Causing Defensiveness

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>You never do it right.</td>
<td>This is often completed incorrectly.</td>
</tr>
<tr>
<td>You’re always late.</td>
<td>This payment is often late.</td>
</tr>
</tbody>
</table>

“Always” and “never” sound critical and uncompromising. Use “often” instead.

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>You filled this out but...</td>
<td>You filled this out well, and...</td>
</tr>
</tbody>
</table>

People don’t listen to what you say before the “but”; they concentrate on what follows. Use “and” instead, so they will listen to the whole sentence.

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>It will cost you...</td>
<td>The rate is...</td>
</tr>
</tbody>
</table>

“Cost” sounds negative. It can imply time, aggravation, and other things in addition to money.

<table>
<thead>
<tr>
<th>Communication Blocker</th>
<th>Communication Helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your problem?</td>
<td>Please tell me what happened.</td>
</tr>
</tbody>
</table>

People don’t like to have problems. They also don’t like others to know they have problems.
Seven Steps For Handling Difficult Customers

1. Remain Calm

Do not react with anger or tears. If you are getting to this point, excuse yourself and take time to calm down. When excusing yourself, do it in a way that shows your interest in serving customers. For example:

- “Excuse me a moment while I check the policy on this.”
- “I would like to get my supervisor’s opinion on this.”
- “I need to verify some information in the file.”

2. Allow Customers To Express Their Concerns

Until customers have had a chance to express their concerns, there is no point in interrupting. She/he won’t hear you at that point. Let them get what they need to say off their chest and listen for key points in what they are saying. Keep eye contact with customers.

3. Show You Understand

Acknowledge customers’ emotions. For example,

- “I understand that you are angry; I would be too.”

4. Restate The Problem

After customers have described their concerns, restate the problems. It could be that you have interpreted the situation quite differently from your customers.
5. Find Agreement - Get On Their Side

After you have a good understanding of the problem, be certain to find a solution that both you and your customers can agree to.

- “Yes, I can see where the problem is. Let’s see if we can fix it.”

6. Gently Confront

Say the person’s name at the beginning of your sentence. Most people listen when they hear their own names. Ask them nicely to let you help them.

7. Transfer Or Delay Your Customers

Sometimes you can’t do anything to calm customers down. If this is the case, pass them over to another employee or your supervisor. Be sure to provide all the details. Often, all it takes is a fresh face saying the same things you have already stated.

When Customers Are Showing Impatience…

When customers begin to show impatience, you should:

- Remain cool and efficient.
- Pick up your speed.
- Smile more and say less.
- Thank them for waiting.
Learning Activity #22

Remember to write in complete sentences and check for correct spelling and grammar!

1. What are eight violent and abusive behaviours shown by angry customers?

2. What is your priority when customers become violent?

3. If you become afraid for your safety, what are five things you need to do?
4. What are the five types of statements that will help you to deal with difficult customers? Provide your own example of a “communication blocker” and a “communication helper” for each.
5. What are seven steps to handling difficult customers? Provide an example of each.
6. When customers are showing impatience, what are four things you should do?


7. Listed below are ten ways to react to difficult customers (someone who is over demanding, drunk, hostile, or extremely hard to deal with in some way). Only three are acceptable forms of behaviour as a customer service professional. Place a check mark the statements you think are acceptable.

When faced with difficult customers you should...

☐ Show a slight amount of disgust on your face so customers will know you consider them a problem.

☐ Smile, be polite, but put customers down with a slight challenge in your eyes.

☐ Stay cool and be patient; let customers talk out their anger.

☐ When dealing with customers, don’t take anything that is said or happens personally.

☐ Walk away.

☐ Become distant and less cooperative yourself.

☐ Calm customers by asking, “Are you trying to give me a problem?”
8. Why did you check-mark those particular three statements? Explain why you believe these are examples of appropriate ways to behave with difficult customers.

9. Why are the other statements not good examples of how to deal with difficult customers?
A Closer Look at the Retail Trade

Although there are many small and medium-sized stores in the retail sector, large businesses with stores in many locations make millions of dollars in sales each year.

Computer technology is becoming more important to the retail industry. Computers are used to keep track of sales and inventory, re-order stock, and study sales trends. The retail industry has been changing in the last few years, as companies compete with each other for a share of the market. Many people get their first job in a retail store.

Big box stores like Home Depot, Wal-Mart, and Canadian Tire are a major trend in retail. These “power centres” have huge parking lots and are extremely popular with consumers.

Selling on the Internet is increasing in Canada. Large organizations are still deciding how to use this technology to increase their sales. The Bay and Chapters are two Canadian companies that sell goods over the Internet. Sales are not as high as in the United States, but they are growing every year.
## Learning Activity #1

Make a list of ten large companies you know about. Look up each company in the Yellow Pages. Does the ad include the Web site address? Fill out the following chart.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Web Site Address Included In Yellow Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Why would companies include their Web site address in the Yellow Pages?
The Outlook

The outlook for sales jobs will be above average over the next few years. There will be increased business and consumer spending because of a booming economy. The demand for both technical and non-technical sales positions will grow. People with excellent communication skills will have an advantage in getting jobs in this field.

Sales associates can be full-time or part-time employees. They may work rotating shifts, including weekends and evenings. Some sales staff work on commission, some are salaried, and some are paid by the hour. Sometimes, sales staff can earn a commission on their sales as well as being paid a salary or hourly wage.

Tools of the Trade

Equipment

Sales professionals use a wide variety of equipment. It can be as simple as a pen and paper. More and more, however, people working in sales need to understand and use a growing list of tools. Even familiar tools are becoming more complicated. Tools are items we use to help us work better and more quickly.

Supplies

Supplies are quite different from equipment. They are items that are used up. A receipt book is an example. It is used to record sales. One copy goes to the customer or client, one stays with the company as a record of the sale for tax and bookkeeping reasons. Supplies are re-ordered as needed.
Learning Activity #2

1. With a partner, think of ten different equipment items that are used in the sales sector. Consider each of the items you listed and decide how it helps a sales professional be more effective. Give an example of how it might be used in a store. One example is done for you.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Function</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculator</td>
<td>Makes mathematical calculations</td>
<td>Find correct discount price on an item that is on sale</td>
</tr>
</tbody>
</table>
2. Share your list with other classmates. Did they come up with similar lists? Write down tools that are not on your list.

3. Fill in the chart below. Think about your work experience in sales or another type of job. List at least ten supplies and write down what sales professionals might use it for. One example is done for you.

<table>
<thead>
<tr>
<th>Consumable Item</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pens and pencils</td>
<td>Write reports, fill in sales orders, jot down notes, and write memos</td>
</tr>
</tbody>
</table>
4. Retail workstations in larger stores have common tools they use. The two pictures below show typical work areas you might find in a retail operation, such as a grocery store. Write the letter from the pictures below next to the correct word in the following table.

<table>
<thead>
<tr>
<th>computer screen</th>
<th>counter</th>
</tr>
</thead>
<tbody>
<tr>
<td>keyboard</td>
<td>scanner</td>
</tr>
<tr>
<td>cash drawer</td>
<td>price display screen</td>
</tr>
<tr>
<td>supply drawer</td>
<td>printer</td>
</tr>
</tbody>
</table>

[Diagram showing a retail workstation with labeled parts a, b, c, d, e, f, g, h.]
5. Find a partner and think about other tools that might be part of a retail workstation. Write down these other tools.

---

Technology

Can a sales associate work without technology? Think about what people do on the job. What technology is absolutely necessary? At the very least, retail stores need a telephone and a calculator. Fax machines and email are important to exchange information quickly. Computers do everything from keeping track of sales to asking another computer to restock inventory. Databases help to keep a record of customers’ numbers. When salespeople can’t contact a customer, they may lose a sale.

Sales associates use technology for a variety of purposes. Some of these purposes are:

- keeping track of sales
- calculating percentages such as discounts
- updating inventory
- preparing a database of customers
- accessing email for company information and updates
- searching the internet for trends to see what the competition is up to
- calling customers and other stores
- faxing information
- analyzing sales
- entering schedules and payroll
Calculator Basics

In this section, you will be shown how to use the basic functions on a calculator. Most calculators are a lot alike, but there will be some keys that will differ. On your calculator, please look for the following basic functions.

The most basic functions of a calculator include the number keys, the decimal point key, the clear keys, the function keys (+, −, x, ÷), and last, but not least, the equal key (=).

There are 10 (0 – 9) number keys on a calculator. You must press one number at a time to enter a number into the calculator. These numbers will be displayed on the screen. If you make a mistake, you can use the clear key.

Your calculator has four or more function keys. These are on every calculator (+, −, x, ÷).

Clear keys allow you to erase mistakes. Some clear functions include:

- **On/Clear (ON/C):** press this once to turn on your calculator; after it is on, this key works as a clear key.

- **Clear:** everything is cleared off of the display, except the memory. You may press this when you want to start over.

- **Clear entry (CE):** this function clears only what you have just entered. You may use this when you made a mistake in your last entry

- **Look on your calculator and find the above clear buttons.**

- **A decimal point is used to separate whole numbers from decimals. You must place this between dollars and cents.**

- **The equal key is one of the most important and basic calculator keys. This key is used to display the final answer of the equation.**
Learning Activity #3

1. Fill in the keys you would press for the following equations.

   a. 78 plus 92
   
   b. 3 times 7 plus 10.8
   
   c. 82 divided by 7 plus 5 times 2 minus 20
   
   d. 0 times 5 plus 7 minus 6 divide by 10 times 30

2. Using your calculator, enter the equations and record your results.

<table>
<thead>
<tr>
<th>Equation</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. [C] 64 [+] [CE] 12 [=]</td>
<td></td>
</tr>
<tr>
<td>b. [C] 64 [+] [-] 13 [CE] 12 [=]</td>
<td></td>
</tr>
<tr>
<td>c. [C] 686 [CE] 585 [÷] 30 [CE] 20 [=]</td>
<td></td>
</tr>
<tr>
<td>d. [C] 56 [CE] 506 [-] 6 [x][-] 256 [=]</td>
<td></td>
</tr>
<tr>
<td>e. [C] 45 [+] 45 [-] [x] 2 [CE] 5 [-]</td>
<td></td>
</tr>
<tr>
<td>f. [C] 21 [÷] 11 [x] 2 [CE] 5 [x] [+] 6 [=]</td>
<td></td>
</tr>
</tbody>
</table>
3. Using your calculator, find the answers to the questions below. Don’t forget to clear your memory before you begin!

a. \(65 - 45 = \) ________

b. \(324 \times 2 = \) ________

c. \(15 \times 8 = \) ________

d. \(89 \div 21 = \) ________

e. \(20 \div 34 = \) ________

f. \(64 \div 8 = \) ________

g. \(56 - 29 = \) ________

h. \(98 + 38 = \) ________

i. \(85 \times 4 = \) ________

j. \(53 - 8 = \) ________

k. \(32 + 8 = \) ________

l. \(95 \div 25 = \) ________
Calculating Dollars and Cents

There are no buttons for dollar signs or commas on calculators. A decimal point is used to separate the dollars from the cents. There is no decimal point needed for an even dollar amount.

For amounts less than a dollar, you put a decimal point and then the cents. Most basic calculators leave out the ending zero when it gives you an answer. For example, if you enter 9.50, and press a function key or the equal key, the screen will show 9.5. 9.5 means $9.50.

Learning Activity #4

Try the following equations with your calculator. Record the answers that are given. Write the totals using dollar signs, commas, and a full cents amount.

<table>
<thead>
<tr>
<th>Equation</th>
<th>Screen</th>
<th>Written Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. $456 + $27</td>
<td>[C] 456 [+] 27 [=]</td>
<td>____________ _____________</td>
</tr>
<tr>
<td>2. $7,890 x $7</td>
<td>[C] 7890 [x] 7 [=]</td>
<td>_____________ ______________</td>
</tr>
<tr>
<td>3. $89.50 ÷ 5</td>
<td>89.50 [÷] 5 =</td>
<td>____________ ______________</td>
</tr>
<tr>
<td>4. 89¢ + 3¢</td>
<td>0.89 [+] 0.03 [=]</td>
<td>____________ ______________</td>
</tr>
<tr>
<td>5. 68¢ + 4¢</td>
<td>.68 [+] .04 [=]</td>
<td>____________ ______________</td>
</tr>
</tbody>
</table>
Addition With A Calculator

When you are using a calculator, you will probably have more than two numbers to add together. Simply clear the display, enter one of the numbers, press the add key, enter another number, press the add key. Do this for all the numbers you need to add up. You will notice that the subtotal is shown on your screen. You can copy this subtotal down at any time before you enter the next number. When adding on a calculator it does not matter how you enter the numbers. It will always produce the correct answer. For example, if you enter 3+4+5+6=18, or if you enter it like this 6+5+4+3=18, the answer will be the same.

Learning Activity #5

1. Using your calculator, answer the following questions.

   a. 459 + 896  
   b. 23 + 58 + 56  
   c. $2.59 + $6.35  
   d. 5 + 6 + 10 + 56 + 0.3  
   e. $.95 + $3.89  
   f. 5 + 20 + .35 + .2
2. Using your calculator, solve these problems.

a.  
\[
\begin{array}{c}
23 \\
+ 98 \\
\end{array}
\]

b.  
\[
\begin{array}{c}
789 \\
+ 456 \\
\end{array}
\]

c.  
\[
\begin{array}{c}
475 \\
+ 326 \\
\end{array}
\]

d.  
\[
\begin{array}{c}
23189 \\
4000 \\
+ 300 \\
\end{array}
\]

e.  
\[
\begin{array}{c}
19.09 \\
+ 356.29 \\
+ .89 \\
\end{array}
\]

f.  
\[
\begin{array}{c}
789.00 \\
989.00 \\
+ 32.00 \\
\end{array}
\]
Word Problem #1

Solve these word problems and don’t forget to show your work.

1. Jen works in a department store. She has sold 126 pairs of shoes in the past week. The week before that, she sold 150. She predicts that she will sell 215 the next week. How many pairs of shoes will she have sold in 3 weeks? (Don’t forget to show your work.)

2. Jane’s art store had sales of $234.67 on Monday, $156.12 on Tuesday, $456.89 on Wednesday, $378.39 on Thursday, and Friday she made $789.00. How much money did her art store make that week?

3. In June Dianna sold 789 t-shirts, 900 pairs of pants, 59 pairs of shoes, 67 ties, 34 pairs of socks, and 456 mitts and scarves. How many items did she sell in the month of June?

4. Dianna had a float of $100 in her cash register by the end of the day she had made $856.34. How much money should she have in total in the cash register?
Subtraction With A Calculator

When using a calculator for a subtraction equation it is quite similar to using a calculator for addition. You must first clear the display, enter the number you want to subtract from, press the subtract key, enter the number to subtract, and then press the equal key.

Example A: Butler Inc. sold 890 CD’s in February and 678 in March. Before these were sold, there were 2000 CD’s in stock. How many are left?

Solution: [C] 2000 [-] 890 [-] 678 [=] 432

Answer: There are 432 CD’s left in stock.

Learning Activity #6

1. Using your calculator, answer the following questions.
   a. 45 – 24 __________
   b. $89 – $56 __________
   c. 3567 – 678 __________
   d. $789.56 – $29.90 __________
   e. 59 – 23 __________
   f. $12 – $9 __________

2. Using your calculator, answer the following questions.
   a. 234
      - 89
      _____
   c. $300
      $261
      _____
      $20
   e. $100.89
      $50.59
      _____
      $3.25
   b. 2000,000
      12,869
      223
      _____
   d. 20.00
      9.56
      _____
      0.35
   f. 0.90
      - 0.35
Word Problem #2

Solve these word problems. Don’t forget to show your work, and check if your answers are correct using the formula shown at the bottom of this page.

1. A customer comes into your department store and hands you four twenty dollar bills ($80.00). His bill comes to $73.86. How much change do you give the customer back?

2. Charlie had a total of $8095 in sales in a 2-week period. Two weeks later he had a total of $3897 in sales. What is the difference between sales?

3. Marina has just bought a business on the main street of her town. She has a budget of $3050.89; she needs $1000 for rent, $789.67 for hydro, and $170.89 for telephone and Internet. She had to replace the sign in the front of her shop. It cost her $1000. How much money does she have left over for advertising and decorating?

You can check your work when subtracting equations by adding back the number you have just subtracted.
Multiplication With A Calculator

Multiplying on a calculator is very similar to adding on the calculator. You can place the numbers in any order and you will have the same answer. You press the times button (x) after each number and at the end of the equation, press the equal button (=).

Example A: A convenience store received 20 cartons of pop. Each carton held 4 cases of 24 bottles of pop. How many bottles of pop did the convenience store receive?

Solution: [C] 20 [x] 4 [x] 24 [=] 1920

Answer: The convenience store received 1,920 bottles of pop.

You will notice that the subtotal is shown on your screen when you press [x]. You can copy this down before you enter the next number.

Checking Your Work

When multiplying with your calculator, you can check your work to ensure accuracy by using division to “undo” the multiplication. Divide the answer by one of the numbers you multiplied. The answer should be the other number.

Example B:

47 x 52 = 2,444

2,444 ÷ 52 = 47
Learning Activity #7

1. Using a calculator, answer the following questions.

   a. $58 \times 6$
   b. $5 \times 20$
   c. $5.03 \times 3$
   d. $5.63 \times 20.35$
   e. $.06 \times 0.0069$
   f. $200.02 \times 32.06$
   g. $5.36 \times 58.56$
   h. $5689 \times 56$
   i. $458 \times 45$
   j. $0.023 \times 0.23569$
   k. $.25 \times .25 \times 58$
   l. $5 \times 9 \times 10 \times 3 \times 87$

   __________
   __________
   __________
   __________
   __________
   __________
   __________
   __________
   __________
   __________

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2. Multiply using your calculator. Don’t forget to check your work by using the formula shown on page 17.

a. $ 300
   x $ 3 5
   x $ 1 0
   ____________________

b. 2 0 0 0
   x 1 0
   x 1 2
   ____________________

c. $ 2 0 .0 0
   x $ .3 5
   x $.1 0
   ____________________

d. 1 3
   x 5
   ____________________

e. 0. 2 3 5
   x 1. 6 5 9
   ____________________

f. $ 5 .2 3
   x $ .6 5
   x $ 2 3 .3 5
   ____________________

g. 2 3 6
   x 1 0 .5 0
   x 2 .6 5
   ____________________

h. 1 2 5
   x 2 2 5
   x 1 0 0
   ____________________

i. 1 0
   x 2 3 2
   x 1 2 2 8
   ____________________

j. .0 2 5 5
   x .2 5 4 7
   x .4 0 0 0
   ____________________
Word Problem #3

Answer the following word problems. Make sure you show your work, and check your work using one of the formulas given.

1. Joey has 20 flats of bread in his store. If there are 8 loaves on each flat, how many loaves of bread does he actually have?

2. Craig owns a retail store. He wants to order some more shirts. They cost $29.99 each. He wants 50 of these shirts. How much would he have to pay?

3. Kory makes $16.00 an hour; he works 8 hours a day. If he worked for 5 days each week for a year (52 weeks), how much money would he make?

4. Each month Gale pays $800.89 to rent her store. How much is she paying to rent the space for a year (12 months)?
Division with Calculators

On your calculator you will find a division symbol. This symbol will look like this: ÷.
When dividing on a calculator, you have to enter the numbers in the correct order. If you don’t, the division will be wrong.

Here are a few examples of different types of division questions.

<table>
<thead>
<tr>
<th>20</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>100 ( \div 5 = 20 )</td>
</tr>
</tbody>
</table>

You must always begin with the number to be divided, when using your calculator.

Example: The cost of printing an advertisement for your store in the newspaper 10 times is $206.40. What is the cost each time?

Solution:

\[ [206.40] [\div] [10] [=] 20.64 \]

Answer: The cost for each advertisement in the newspaper is $20.64.

Checking Your Work

When you are dividing on a calculator you can check for accuracy by “undoing” the division. Multiplying your answer with the number that you used to divide with can do this.

\[ [20.64] [\times] [10] [=] 206.4 \]
Learning Activity #8

1. Using a calculator, answer the following questions. Check your work using multiplication.

a. $65 \div 5 = \underline{13}$

b. $56.35 \div 7.25 = \underline{7.8}$

c. $\$89.00 \div \$5.00 = \underline{17.8}$

d. $0.89 \div 0.32 = \underline{2.78125}$

e. $1023 \div 106 = \underline{9.7}$

f. $102 \div 2 \div 20 = \underline{0.051}$

g. $5 \div 86 = \underline{0.058}\text{ or }0.00058$

h. $\$456.89 \div \$102.35 = \underline{4.477}$

i. $502.2 \div 0.0056 = \underline{89,321.07}$

j. $100002 \div 506 = \underline{197.8}$
**Word Problem #4**

Answer the following questions, making sure you show all of your work. Don’t forget to check your work!

1. Todd purchased 20 mirrors for his store. The total cost was $1,034.04. How much was each mirror?

2. Mr. O’Connor wants to order 40 new books for his bookstore. He can only order them in boxes of 4. How many boxes does he have to order?

3. Jessie orders $500 worth of advertising on a billboard for 8 months. How much is she paying per month?
Simple Averages on a Calculator

Finding the average on a calculator takes two steps. The first step is to add up the numbers. Then you divide the total by how many numbers are in the group.

The general formula is \( \frac{\text{Total of the numbers}}{\text{How many numbers}} = \text{Average} \)

Example: Susan worked the following hours for 4 weeks: 30, 42, 35, and 37. Find the average weekly hours.

Solution:

\[
\begin{array}{c}
\text{Step 1:} \\
30 \\
+ 42 \\
+ 35 \\
+ 37 \\
\hline 
144 \\
\text{Step 2:} \\
[144] \div [4] = 36 \\
\end{array}
\]

Answer: Susan worked an average of 36 hours a week.

On a calculator, you can add up the numbers, then divide without clearing between steps!

Learning Activity #9

1. Use your calculator and find the average for each set of numbers.
   a. Sales: $589.36, $923.25, $742.12, $892.23, $895.12  
   b. Hours worked: 35, 45, 26, 34, 28, 20
   c. Customers Served: 452, 282, 328, 400
   d. Items sold: 56, 85, 43, 89, 73, 46
2. Below are a store’s sales for the month of June. Find the average sales for each department, and then find the average sales for all departments in the store.

<table>
<thead>
<tr>
<th>Department</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Total</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Shoes</td>
<td>200.56</td>
<td>168.65</td>
<td>800.56</td>
<td>300.85</td>
<td>300.85</td>
<td></td>
</tr>
<tr>
<td>b. Men’s Clothes</td>
<td>800.96</td>
<td>902.54</td>
<td>889.36</td>
<td>950.23</td>
<td>950.23</td>
<td></td>
</tr>
<tr>
<td>c. Women’s Clothes</td>
<td>1000.89</td>
<td>995.24</td>
<td>899.29</td>
<td>1025.78</td>
<td>1025.78</td>
<td></td>
</tr>
<tr>
<td>d. Youth’s Clothes</td>
<td>800.56</td>
<td>700.25</td>
<td>689.42</td>
<td>699.12</td>
<td>699.12</td>
<td></td>
</tr>
<tr>
<td>e. Infants Clothes</td>
<td>300.85</td>
<td>389.42</td>
<td>500.45</td>
<td>452.21</td>
<td>452.21</td>
<td></td>
</tr>
<tr>
<td>f. Home Appliances</td>
<td>9000.98</td>
<td>3008.45</td>
<td>6000.45</td>
<td>10000.21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Sports</td>
<td>2000.00</td>
<td>2089.31</td>
<td>2094.89</td>
<td>2098.32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Toys</td>
<td>500.23</td>
<td>856.25</td>
<td>896.12</td>
<td>826.96</td>
<td>826.96</td>
<td></td>
</tr>
<tr>
<td>i. Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Nancy has been working at the department store for 4 weeks. She has been keeping track of how many hours she worked; she gets paid $8.00 an hour. Fill out the chart below.

<table>
<thead>
<tr>
<th>June</th>
<th>Sum</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Week 2</td>
<td>Week 3</td>
</tr>
<tr>
<td>Hours Worked</td>
<td>38</td>
<td>42</td>
</tr>
<tr>
<td>Amount paid</td>
<td></td>
<td>384.00</td>
</tr>
</tbody>
</table>

e. Tips: $52.25, $78.35, $20.89, $35.83
Word Problem #5

Use your calculator to find the answers to the word problems below. Make sure you record all of your work.

1. The Paint Shop has a number of cans of paint priced at $8.75, $10.25, $5.89, and $12.75. What is the average cost for a can of paint?

2. The Butler Company bought 20 new cameras for their security system. The total cost was $1800.00. What was the average cost of a surveillance camera?

3. Sally worked the following hours each week: 45, 36, 38, 46, 30, and 20. What were the average hours she worked per week?

4. Tracey served 200 customers one night at the cashier desk. The next day she served 89. The following 3 shifts she served 150, 45, and 150 customers. What was the average number of customers Tracey served for these 5 shifts?
Decimals with a Calculator

Place Values

Rounding Decimal Numbers

When multiplying and dividing, some answers may show many numbers after a decimal. When this happens, you will have to round your answer. Here are some pointers to help you round correctly.

- look for the next number after the first two numbers after the decimal.
- if the number is 5 or more, round the number up to the next higher number.
- if the number is 4 or less, keep the number to the left the same.
- drop all the other numbers to the right.

Example: Rounding to two decimal places.

20.568 rounds off to 20.57 - since the 8 is 5 or higher, add one to the 6.
20.452 rounds off to 20.45 - since the 2 is lower than 5, keep 5 the same.

Learning Activity #10

1. Rewrite these calculator answers rounding to two decimal places.

   a.  85.269  _______  e.  62.69123  _______
   b.  458.396  _______  f.  42.352  _______
   c.  7.99  _______  g.  234.561  _______
   d.  10.256  _______  h.  4.932  _______
2. Rewrite these calculator answers as dollars and cents, rounding to the nearest cent. Don’t forget the dollar sign ($)!

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 293.568</td>
<td></td>
<td>e. 6.259863252</td>
<td></td>
</tr>
<tr>
<td>b. 359.210</td>
<td></td>
<td>f. 8956.8</td>
<td></td>
</tr>
<tr>
<td>c. 8.26</td>
<td></td>
<td>g. 1.562</td>
<td></td>
</tr>
<tr>
<td>d. 45.238</td>
<td></td>
<td>h. 78.3256894</td>
<td></td>
</tr>
</tbody>
</table>
Percents At Work

Fractions, Decimals, and Percents

Percents, fractions, and decimals show parts of something.

99/100 means the same as 0.99 or 99%.

Here are a few more examples. Do you see any patterns?

<table>
<thead>
<tr>
<th>Fraction</th>
<th>Decimal</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/100</td>
<td>.10</td>
<td>10%</td>
</tr>
<tr>
<td>25/100</td>
<td>.25</td>
<td>25%</td>
</tr>
<tr>
<td>67/100</td>
<td>.67</td>
<td>67%</td>
</tr>
</tbody>
</table>

Learning Activity #11

1. Write each percent as a decimal, do not use your calculator!
   
   a. 15% _____  
   b. 33% _____  
   c. 50 % _____

2. Write each decimal as a percent. Do not use your calculator.
   
   a. 0.25  _____  
   b. 0.85  _____  
   e. 0.06  _____  
   f. 0.009  _____  
   c. .29  _____  
   d. .45  _____  
   g. 0.64  _____  
   h. .099  _____  

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Cash Registers

Cash registers are used to calculate the sales total for merchandise, record and receive payments from customers for goods and services, and give correct change. There are many brands and models. An older manual cash register displays the amount charged for goods, taxes, and total. Newer cash registers are fully functional computers called Point-of-Sale (POS) terminals. They have many features, including the ability to update inventory and keep records on each customer.

Most retail stores provide on-the-job training for new cashiers. The new cashier will work with, or “shadow” an experienced cashier until they are comfortable with the functions of the cash register. Some stores offer computer-based training for new cashiers.

Terminology

Tender Type
Tender type is the method of payment. It could be cash, cheque, credit, or debit card.

PLU
PLU is a key on the keyboard that is programmed to do Price Look Ups. When a cashier needs to look up the price of an item for a customer, entering the product code after selecting the PLU key will bring up the price.

Void
The void key on a cash register allows the cashier to remove a single item from a list of purchases or can be used to delete the entire transaction.

Subtotal
Subtotal is the cost of the purchase before taxes.

Total
Total is the cost of the purchase including taxes.

POS
Computerized cash registers are called Point-of-Sale terminals.
Barcode
A barcode is a Universal Product Code Identification Number (UPC) that is encoded by using a series of lines with different widths and spacing. The product’s barcode determines the type and cost of the product being sold. When a barcode is scanned into the computer, it will display the description of the product as well as the price. Stores can use this information to keep track of inventory. If a barcode is damaged and doesn’t scan, there is also a number at the bottom of the barcode that can be entered manually. This number will also bring up the product information and price.

Inventory Database
Some retail stores have entered product information into the computer as a database. This is similar to the way customer information is stored. This inventory database can be used when there is no barcode on an item. Below is an example of how items are listed in an inventory database. Inventory is usually stored under the name of the supplier.

<table>
<thead>
<tr>
<th>Bar Code</th>
<th>Colour</th>
<th>Type</th>
<th>Price</th>
<th>No. Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>06395274</td>
<td>Heather Blue</td>
<td>Crewneck s/s</td>
<td>14.99</td>
<td>6</td>
</tr>
<tr>
<td>05284367</td>
<td>Navy Blue</td>
<td>Turtleneck l/s</td>
<td>21.99</td>
<td>10</td>
</tr>
<tr>
<td>02563481</td>
<td>Heather Blue</td>
<td>Cardigan l/s</td>
<td>18.99</td>
<td>6</td>
</tr>
<tr>
<td>07485632</td>
<td>Sky Blue</td>
<td>Vneck l/s</td>
<td>24.99</td>
<td>8</td>
</tr>
<tr>
<td>03624875</td>
<td>Sky Blue</td>
<td>Crewneck l/s</td>
<td>22.99</td>
<td>10</td>
</tr>
</tbody>
</table>
## Electronic Cash Register

![Diagram of Electronic Cash Register]

### Parts

**Customer Display**
The customer display is the screen that shows the customer the total of the purchase. It can also be set to display how much change the customer should receive.

**Main Display**
The main display is what the cashier sees. It can be programmed to show date and time, what mode the cash register is in, subtotals, and totals.
Mode Switch

The mode switch allows the cash register to be used in different modes. A mode key is entered into the switch to change the modes.

- **CAL** Use the cash register as a calculator.
- **REG** Use this mode for regular transactions.
- **Off** To turn the cash register off.
- **RF** To do a refund transaction.
- **PGM** To program the keys on the keyboard, set the date and time.
- **X** Read or print the sales data without clearing the memory.
- **Z** Read or print the sales data, then clear the memory.

Cash Drawer

The cash drawer opens when the ‘total’ key on the keyboard is pressed. You will usually find 4 slots so that you can separate $50, $20, $10, and $5 dollar bills. This cash tray will lift up so that the cashier can put in checks, debit and credit card transactions, and bigger bills. Coin holders will be in front of the bill slots so that the coins can be organized and separated.

Keyboard

When a cash register is purchased, it can be programmed to meet the needs of the retail establishment. The system can also be programmed to generate different reports. For example, a larger store may want a report on the total sales for each department in that store. Some of the keys that are common to most keyboards are Void, Tax, Sub-total, Total, Refund, and PLU.

Receipt

When a sale is completed, a receipt will be printed. Generally, the receipt will have the store name and address, the price of the individual items, subtotal, taxes, and a total.
Cash Register Maintenance

Cash registers have a printer that prints the receipts. The paper rolls have to be replaced when they run out. Ink cartridges have to be replaced when the printing on the receipt starts to fade. Instructions for changing these items can be found in the cash register manual.

Types Of Transactions

There are many transactions that can be done using a cash register. Here are a few examples.

- Cash transaction – The customer will be paying with cash.

- Cheque, credit, or debit card – The customer will be paying either by cheque, credit, or debit card.

- Split tender – The customer will be paying using a combination of cash, cheque, credit, or debit card.

- Refund – The customer is returning an item and the money they paid will be returned to them, or a store credit will be given.

- Void – An incorrect entry was made when the cashier was entering the information into the cash register. A void will allow that entry to be deleted.

- Reports – A report can be generated throughout the day to show sales data without resetting the cash register to ‘zero’. Another report is generated at the end of the day to show sales data and then resets the cash register to ‘zero’ for the next business day.
Learning Activity #12

What could go wrong with your cash register?
- The cash drawer does not have enough change for the transaction.
- There is a power outage.
- A customer is interested in buying an item, but wants to know the price before deciding to make the purchase.

1. Pick one of the situations and describe how you would handle the problem. Remember to use your customer service skills.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

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Point-Of-Sale Terminals (POS)

Point-of-sale terminals have replaced the older style cash registers in many retail stores. A wide range of models can be found in every type of retail establishment. A popular model with fast food restaurants is the touch pad system that lists menu items on the keyboard. One of the newer features of computerized cash registers are receipts that list the items by name as well as the price. The software loaded on the computerized system will determine the POS terminal’s capabilities and features.
Parts

Customer Display
The customer can see the total of his purchase on this screen.

Monitor
Displays the information the cashier is entering into the cash register.

ON/OFF Button
Turns the cash register on or off.

Cash Drawer
Contains the cash, coins, cheques, credit and debit card transactions.

MSR Slot
The magnetic card stripe reader is used for credit cards. When the credit card is “swiped”, the computer confirms that the card is valid, and that the credit card company accepts the customer’s purchase. Debit cards have a separate reader.

Keyboard
The programmable keyboard allows the cashier to enter information into the cash register.

Bar Code Reader
Scans the information from the products into the cash register.

Receipt
The receipt displays the store name and address, itemized list of the purchases, sub-total, taxes, and total.

Features

Bar Code Scanning
A POS with a bar code scanner can calculate the sale then transfer the information to the store system that keeps track of inventory.
Credit Card Processing
Credit cards are scanned into the POS system. The authorization number and signature line are printed on the customer credit card slip. The customer signs this slip, and the cashier places the slip in the cash drawer. The POS system also prints a receipt at the same time, which is given to the customer.

Customer Data
Customer information can be entered into the computer. This information can be used to inform customers of upcoming sales and special discounts.

Item Quantity And Price Lookup
The quantity key is used when a number of the same item is purchased. The cashier will enter the number, e.g. 6, and press the quantity key. At this point, only one item needs to be scanned or entered.

Price Lookup allows the cashier to find the price of an item by scanning the bar code.

Pop-ups
Some POS systems have “pop-ups”, or small boxes that come up on the screen. These pop-ups ask you to do certain things before you can continue with the sales transaction. For example, a pop-up may say, “check customer signature” or, “offer extended warranty”. A pop-up also has an “OK” button that you will need to touch or click on before you can enter another item.

Processing Transactions
You will need to enter a password to start a transaction on your Point-of-Sale terminal. Once you have entered your user password, you are ready to process sales transactions.

1. Enter the items into the computer either by scanning using a barcode reader or by manually entering the item codes.

2. Total the sale.
3. Select the type of payment the customer will be using, make change, if it is a cash payment, the receipt will print, and you will be ready for the next transaction.

**Learning Activity #13**

1. There are many advantages to the computerized cash registers. Think of 2 advantages and explain why.
Computer Basics

Computers can be found in almost every workplace. In a retail setting, these machines can be a computerized cash register or a system that runs the store’s inventory program. They can also be training tools for new employees, a system that allows you to write documents, access the Internet, and send emails. A computer is made up of hardware and software. The hardware are the parts of the machine and software are the programs that run on the computer.

Hardware

Central Processing Unit (CPU): the processor and the memory of the computer.

Memory Chips: hold information that the computer needs to use. These chips are connected directly to the processor.

Input: input is data that is entered on a computer using a keyboard and a mouse.

Output: output is data that is transferred from a computer to other parts, such as a monitor or a printer. These devices allow the user to see the data.

Mass Storage Device: These disks or tape drives can permanently store vast amounts of data. Storing information on disks prevents the data from being lost during a computer breakdown or power outage.
Hardware

Learning Activity #14

Test your knowledge. Match the terms with the definitions. If you do not know what an item does, do some research on the Internet or use a computer manual.

- Central processing unit
- Chip
- Hard drive
- Keyboard
- Modem
- Monitor
- Motherboard
- Mouse
- Laptop
- Peripheral
- Scanner

1. ______________ is a device that allows the user to communicate with the computer without using the keyboard.

2. ______________ is a computer device that reads and writes data using one or more magnetic disks.

3. ______________ is a PC about the same size as an ordinary sheet of paper and about 5cm thick.

4. ______________ is an integrated circuit used for the processor and memory of a computer.
5. ____________ is an input device that is designed to recognize patterns of printed or drawn markings.

6. ____________ is any device attached to your computer that is not required for basic operation, e.g., printer, external drive, or tape back-up.

7. ____________ takes digital data from a computer and converts it into electrical pulses that can be sent over a telephone line.

8. ____________ is the main device used for entering data into a PC or giving it instruction to do a certain task.

9. ____________ is the main circuit board containing the vital components of a PC such as the processor and the RAM.

10. ____________ is the processor and the memory of the PC.

11. ____________ is used to display the images generated by a PC’s video adapter.
Learning Activity #15

1. Write the number from the picture below in front of the matching correct word. For example, the Floppy Disk Drive is #2.

___ Monitor  ___ Printer
___ Cable connector  ___ CPU (hard drive)
___ Keyboard  ___ Track ball
___ Zip drive  ___ CD-ROM
___ Laptop/ notebook  ___ Power bar
___ Scanner  ___ Mouse
___ Floppy disks  ___ On/Off switch
Software

Computer programs are software applications. There are numerous kinds of applications that allow users to complete a wide variety of tasks. The most widely used application is word processing. The most common word processors include WordPerfect, Microsoft Word, and Lotus WordPro. Word processors have replaced the typewriter as the way to create documents. The documents can be corrected and revised with great speed and efficiency. Other popular software found in a retail environment includes spreadsheet and database applications.

Learning Activity #16

Test your knowledge. Match the terms with the definitions. If you do not know what an item does, do some research on the Internet or use a computer manual.

Spreadsheet  Application software  Cursor
Icon         Bug              Downloading
Data         Toolbar          Menu bar

1. __________ is a flashing rectangle or line on the screen that shows exactly where the user is working.

2. A__________ sits across the top or down the side of a particular window. It allows the user to perform certain tasks such as opening a file or printing. It can usually be customized so that the user can add those tasks most regularly performed.

3. __________ is a program for manipulating numbers and appears on the screen as a set of rows and columns.

4. __________ is the electronic transfer of information from one computer to another, generally from a larger computer to a smaller one, such as a laptop.
5. __________ is found in Windows, and is a bar across the top of the current window which contains the headings of a number of available menus.

6. __________ is the content of a file, e.g. the information contained within a spreadsheet or the contents of the records on a database.

7. __________ is an error in a computer program.

8. __________ is a small picture that is displayed on the screen.

9. __________ are programs written to serve a particular function for the computer user. Typical examples are word processors, spreadsheets, and games.

**Learning Activity #17**

These are some of the software applications used in a business environment. What software are you familiar with? Circle the ones that you have heard about before. Put a star beside the ones that you can use.

ACCPAC  CorelDraw  MS Access
MS Excel  MS Front Page  MS Internet Explorer
MS Outlook  MS Power Point  MS Windows
MS Word  Netscape  Quattro Pro
Quicken  WordPerfect
Why are Computers useful in the Retail Industry?

Most cash registers today are connected to computers. They are called Point of sale terminals or POS terminals. They can provide:

- Quick and accurate sales transactions
- Inventory control
- Price look-up and product availability

Many retailers use computers for:

- E-mail
- Internet browsing
- Computer-based training material

How to Operate a Computer

Your computer training will depend on the tasks that you are expected to do.

Many companies offer in-house computer-based training for specific software applications that are only used by their company.

More formal computer training may be needed if you will be working with word processors or spreadsheets.
The Internet

The Internet can connect retailers and customers across great distances in a very short period of time. Whether the retail company is small or large, the Internet has proved to be a valuable tool. A home page for the business can be created on the Internet so customers have access to merchandise and services on-line. Customers are able to do banking, shopping, and even order take-out food. Internet use is increasing every day. You will need a browser to use the Internet.

Browser

A browser is a computer program that allows you to access the Internet. It will display web pages, record the sites that you have visited, and allow you to bookmark a particular site for speedy access the next time. Internet Explorer and Netscape are examples of browsers that are available.
The Internet

Learning Activity #18

Match the terms with the definitions. If you do not know what a word means, check on the Internet, or use a Computer textbook.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bookmark</td>
<td>A link set up by the user to a particular Web page.</td>
</tr>
<tr>
<td>Cyberspace</td>
<td>The interaction of humans with computers.</td>
</tr>
<tr>
<td>Downloading</td>
<td>The electronic transfer of information from one computer to another.</td>
</tr>
<tr>
<td>JPEG</td>
<td>The most common type of image file, compressed so they take up a minimum amount of space and can therefore be downloaded more quickly than other graphics files.</td>
</tr>
<tr>
<td>GIF</td>
<td>A standard used on the World Wide Web for video and audio files.</td>
</tr>
<tr>
<td>MPEG</td>
<td>A program that you use to navigate the World Wide Web.</td>
</tr>
<tr>
<td>Browser</td>
<td>The Internet naming scheme, which consists of a hierarchical sequence of names from the most specific to the most general (left to right), separated by dots.</td>
</tr>
<tr>
<td>Domain name system</td>
<td>The Internet naming scheme, which consists of a hierarchical sequence of names from the most specific to the most general (left to right), separated by dots.</td>
</tr>
</tbody>
</table>
Internet Discussion

Learning Activity #19

Either in writing or orally, answer the following questions. (Do your classmates agree with you?)

1. Do you think the Internet will die from "gridlock" (becoming completely slowed down by the fact that there are too many users)? Or will hardware and software keep up with the demand? Explain your answer.

2. We have to pay money to an Internet Service Provider, but otherwise the Internet is free for anyone to use. Do you think the Internet will always be free, or will we have to start paying to use it?
Email

Email is electronic mail that is sent between computer users. It is a convenient, quick way to send and receive memos, documents and other information. It can be sent to a single user or to a list of people instantly. There are many email programs for computers, for example, Microsoft Outlook and Pegasus. In a retail setting, email is a convenient way for management to pass on updated information regarding upcoming sales, updated store policies, or any other general information to the sales staff. Some businesses also email information to their customers.

Learning Activity #20

Either in writing or orally, answer the following questions. (Do your classmates agree with you?)

1. Describe the type of email you use. For example, do you use a program such as Outlook, do you use Web-based email, or do you use a provider such as AOL? Why is your use of email different from that of other people?

2. Email is perhaps the most common or most popular part of the Internet. Why do you think this is so? What are the advantages of sending information by email, compared to other ways of sending information?
3. What are some of the annoying parts of communication by email? In your opinion, what are five ways to avoid problems in email communication?

Email Etiquette

Writing letters and using the telephone have practices that guide their use. Using ‘yours sincerely’ in a letter, or announcing your name and/or number when you answer the telephone help promote good communication between you and your co-workers or clients. Electronic mail, however, is a new form of communication. The number of new users is increasing every day. Few people are aware of appropriate practices. These practices, (often called ‘network etiquette’, or ‘netiquette’) are important because it is easy to send email messages very quickly, and not think about how a message will be received. For example, if you intend something in fun, will the humour be evident? If not, it could be quite offensive. A simple practice is the use of what are known as ‘smileys’: for example, :-) means that what you wrote is a joke.

Here are some suggestions for good email etiquette:

**Make the subject line a headline.**
Good emailers summarize their message into a single subject line of no more than 5-8 words. This headline tells the story of the message, just like a newspaper headline is the lead story in a sentence.
Eliminate the middle mail.
If I send you a message that asks if we can get together at a certain time, don’t respond immediately and say, “Let me check my date book and get back to you.” Reply only after you have checked your date book and can answer the question or provide the information needed by the original email.

Be courteous in all email.
“Flame mail” (angry messages that insult or ridicule), is now common in cyberspace. Don’t be rude, be as polite face to screen, as you would be face to face.

Be careful what is said and promised.
All email accounts at your work are the property of the employer, who is within his rights to read all email sent to his email accounts. Be careful what you say and to whom you say it. This is especially important for those sending messages to or receiving messages at an email address at work. If you have your own business, be careful not to promise anything that cannot be done since email is as valid as a stamped letter in a court of law.

Do not send unsolicited files.
There is nothing more annoying for an Internet user than to have to wait for 10 minutes while a file he didn’t ask for is downloaded. Ask the person for permission before sending a file via email.

Do not overuse fonts, colours, and clipart in email messages.
The occasional word, coloured for emphasis, or simple clipart in an email message is acceptable, but when every message received from an individual looks like modern art, it’s time for a change. Use fonts, colours, and clipart sparingly.

Do not respond to spam messages.
Spam is the nickname given to all unsolicited commercial email messages sent to you. They have earned the name spam as a result of their “canned” appearance. If you frequently receive spam, you might be tempted to ask the spammer to remove you from the list. This is the worst thing you could do. A reply to a spam message only confirms to the spammer that your email account is valid. Instead, simply hit the delete button.
Do not use too much punctuation!!
You'll see lots of email messages where people put a dozen exclamation points at the end of a sentence for added emphasis. Exclamation points are just another way to end a sentence. If something is important, it should be pointed out in the email message.

Do not use too many abbreviations.
Abbreviations have become common with email. Only use abbreviations that are common to the English language, such as FYI (for your information) and BTW (by the way), and only with people who you know will understand them.

Use smileys carefully.
Smileys are simple strings of characters that are put in the email to show the writer's feelings. The most common example is :-) . Turn your head to the left and you should see a happy face (the colon is the eyes, the dash is the nose and the parentheses is the mouth). Smileys are usually found at the end of sentences. Use them carefully, because their translations are not universal (a misinterpreted smiley could cause flame mail).

Use the appropriate salutation.
In a non-business situation, simply use the person’s name. You may also use “Dear” and the person’s name (e.g., “Dear Virgil” or just “Virgil”). In a business situation, use the following as a guide: If you normally address a person as Mrs./Mr./Miss/Ms. Smith then that's the way to address them in email. If you normally call them by their first name then either omit the salutation or simply use their name or “Dear” and their name. If you are unsure, then stick to the formal salutation. It's the safest bet.

Use a signature to identify yourself.
Since it is not possible (yet) to sign your email, users will sometimes include their name and company name at the bottom of all email messages. You will sometimes see a user's signature that contains a quote (as in “…the secret to life is that there is no secret.”) after the person's name. This has become a fairly common practice. If you choose this option, choose a quote that says something about you. Keep it short.
Continue the thread.
Once you send that first email, you will probably get an answer. If you want to reply, what should you do? Do not start a new email message. This breaks the link (called a thread) between the original message, the answer, and your new response. Without the link, it can get difficult for the users on each end to follow the sequence of messages, especially after several exchanges. The correct thing to do is to click on the reply button, which is the same thing as creating a new message, but keeps the thread.

Email

Learning Activity #21

Match these email terms with their meaning:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Netiquette</th>
<th>Spam</th>
<th>Thread</th>
<th>Courteous</th>
<th>Smilies</th>
<th>Flame mail</th>
<th>Salutation</th>
<th>FYI</th>
</tr>
</thead>
</table>

1. ____________ is a link between the original message and the response.

2. ____________ is general agreement about how to behave.

3. A ____________ is made up of words used to address the person to whom you are writing.

4. ____________ means for your information.

5. ____________ are a simple string of characters used in e-mail text to show the writer's emotions.

6. ____________ is unsolicited commercial e-mail messages.
7. _____________ is a set of conventions used in electronic communication.

8. ______________ means having or showing good manners.

9. _____________ is angry messages that insult or ridicule.

**Faxes**

A fax is a document that is transmitted across a phone line. The fax machine at one end sends the document, and a fax machine at the other end receives the document. At the sending end, a photo sensor records whether the space on the paper is black or white. It encodes this information and transmits the data over the phone line. At the receiving end, the fax machine decodes the information and a mechanism marks the paper with black dots.

The fax is a very significant tool for retailers. It enables them to send purchase orders to suppliers and to send quotes to customers for potential sales.
Common Work Tasks

Retail professionals have a wide range of tasks common to all employees in retail. The following are skills that you will use in any retail associate position.

Using Fundamental Math

As a retail associate, you need to be able to find percentages, multiply, and divide. Therefore, you would use basic math skills such as money math and a calculator.

Research Skills

Finding information for a customer, such as seeing if another store in the chain has an item in the right size or colour is just one way your research skills could be used. Another example is the ability to find the appropriate information to send a package to the company’s head office.

Organization and Planning

To complete a sales transaction, you need to follow a process in a timely, organized manner and be certain not to miss a step. For example, knowing the correct steps needed to process a refund on a credit card. You must also be able to plan your workday so you complete all required tasks.

Problem-solving

Problem-solving skills are important every day in retail. The following are some examples:

- If a customer is unhappy about a purchase, as a retail associate you need to be able to quickly come up with a solution that pleases the customer.

- If your cash register system is not operating properly, you need to be able to use a calculator and pencil and paper to temporarily calculate sales
transactions. You also need to be able to notify the appropriate people about the system problem.

- If a customer asks about an upcoming sale they read about in the newspaper that you are not aware of, you need to be able to find that information. Most likely, this will be in the company’s email messages about upcoming promotions.

**Communication**

Reading, writing, listening, and speaking skills are required of all retail associates. A retail associate reads various forms of information. Some examples are company guidelines and upcoming events, sales, invoices, schedules, and email messages. Writing includes entering bank deposit information, important messages for your supervisor or co-workers, and filling in returns and exchanges. Listening and speaking skills include the various ways you will be communicating with your supervisors, co-workers, and customers.

**Computer Proficiency**

This is also known as computer literacy. It is important to have basic computer skills in the world of retail. The need for these skills continues to grow. Computer proficiency includes the ability to use the Internet, email, and fax machines.

**Teamwork**

Retail associates, like most workers today, work as part of a team and need to develop this essential skill. An example of effective teamwork is the ability to work co-operatively and efficiently together to reach specific company goals.

**Customer Service**

Customer service is the most important part of any retail position. Retail associates need to have excellent people skills. As a retail associate, you
need to enjoy working with people, be interested in them, and be quick to respond to their needs.

**Learning Activity #1**

Remember to write in complete sentences and check for correct spelling and grammar!

1. Fill in the blanks by choosing the correct word in the box to complete each sentence.

   - refund  ● percentages  ● juggling
   - strategy  ● proficiency  ● relationship

   a. My __________________ with my math teacher was not a good one. I could not understand ________________!

   b. Busy people get everything done by ______________ more than one thing at a time.

   c. The sweater that I was given didn't fit. I returned it for a __________.

   d. Another phrase for computer literacy is computer ______________.

   e. A good ______________ to use in looking for work is to make a list of skills required from job ads in your sector.


2. Mai Ling was thrilled to find the exact dress she wanted for her first day at her new job. She was also happy because the dress was marked down 20%. The original price was $79.99. The product number on the price tag was 1233321. When Mai Ling went to pay for it, Carla, the retail associate, was very apologetic. She told Mai Ling that the computer
system was down and she would have to handle the transaction manually. For the inconvenience, she would take another 5% off of the final cost of the marked down dress. Mai Ling smiled at Carla. Another 5% was worth the wait.

The following is a blank receipt. Complete it for Mai Ling the way Carla would have to. Remember to use all of the math and calculator skills you have learned in the previous units!

<table>
<thead>
<tr>
<th>Item</th>
<th>Product number</th>
<th>Quantity</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less percentage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coupons or other discounts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Sale</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Carla used a number of skills in this transaction. Beside each skill listed below, describe how Carla would have applied this skill. Provide as much detail as possible.

Communication Skills:
Fundamental Math Skills:

Problem-solving Skills:

Customer Service Skills:
4. With a partner, discuss the following questions. Someone should be the recorder and someone should be the presenter. Present your ideas to other pairs, if possible. If not, answer the following questions independently.

Do you think Carla did the right thing? Explain why or why not.

__________________________

__________________________

__________________________

__________________________

Carla is an employee, not an owner. Do you still think Carla was right in her decision? Explain why or why not.

__________________________

__________________________

__________________________

__________________________

Refer to question number two. Write a brief description of how you would have dealt with this problem. Describe the skills you would use.

__________________________

__________________________

__________________________

__________________________

__________________________

__________________________

__________________________

__________________________

__________________________

__________________________
5. The following chart is a list of work tasks described in Human Resources and Skills Development Canada’s Essential Skills Profile for retail sales professionals. Assign a code to the list of work tasks according to the skills needed to perform them. The codes are in the first box. There will be multiple skills involved for each task.

<table>
<thead>
<tr>
<th>N – Numeracy</th>
<th>C – Communication skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>R – Reading comprehension</td>
<td>IT – Computer skills/ information technology</td>
</tr>
<tr>
<td>W – Writing skills</td>
<td>F – Ability to understand forms, charts, or graphs</td>
</tr>
<tr>
<td>P – Problem-solving skills</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Read product labels for information on the care of products and for instructions on the use of products.</td>
</tr>
<tr>
<td>2.</td>
<td>Read lists of customer entries in a database.</td>
</tr>
<tr>
<td>3.</td>
<td>Complete purchase orders to restock inventory.</td>
</tr>
<tr>
<td>4.</td>
<td>Refer to assembly drawings of a product.</td>
</tr>
<tr>
<td>5.</td>
<td>Use word processing to write a letter or quote a price to a customer.</td>
</tr>
<tr>
<td>6.</td>
<td>Refer to product books or catalogues to find the range of items offered in various product lines.</td>
</tr>
<tr>
<td>7.</td>
<td>Contact another branch by telephone or email to find out the availability of items requested by customers.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>8.</td>
<td>Use communication software like email.</td>
</tr>
<tr>
<td>9.</td>
<td>Decide whether to match a price offered by another store if the price difference is not too big.</td>
</tr>
<tr>
<td>10.</td>
<td>Handle cash, credit card and debit card transactions, and provide change.</td>
</tr>
<tr>
<td>11.</td>
<td>Use a telephone appropriately and efficiently.</td>
</tr>
<tr>
<td>12.</td>
<td>Read comment cards filled in by customers.</td>
</tr>
<tr>
<td>13.</td>
<td>Read company guidelines about inventory control.</td>
</tr>
<tr>
<td>14.</td>
<td>Fill in accident or incident report forms.</td>
</tr>
<tr>
<td>15.</td>
<td>Write phone messages and record quote information.</td>
</tr>
<tr>
<td>16.</td>
<td>Calculate discounts, taxes, and currency exchange.</td>
</tr>
<tr>
<td>17.</td>
<td>Read notices about policies, procedures, benefits.</td>
</tr>
<tr>
<td>18.</td>
<td>Greet customers and make general conversation.</td>
</tr>
<tr>
<td>19.</td>
<td>Observe suspicious behaviour by customers. Call security or stick close to the person to prevent a possible theft.</td>
</tr>
<tr>
<td>20.</td>
<td>Read model numbers on products.</td>
</tr>
<tr>
<td>22.</td>
<td>Write delivery information clearly on packages that are to be picked up by courier.</td>
</tr>
<tr>
<td>23.</td>
<td>Read and interpret sales statistics comparing sales over various periods of time.</td>
</tr>
<tr>
<td>24.</td>
<td>Interact with customers to explain the features of products, respond to customers’ questions, and persuade them to make the purchase.</td>
</tr>
<tr>
<td>25.</td>
<td>Organize special events such as fashion shows, special sales.</td>
</tr>
</tbody>
</table>

Additional skills

In addition to the basic skills required in retail occupations, employers today are looking for skills to fit the new workplace. There are more responsibilities and changing rules and regulations. The following is a list of skills that employers are looking for, both traditional and additional skills. If you have any of these additional skills, make sure you mention them in resumes and interviews! While these skills may be general, they are the skills that all employers in Canada have said are necessary.

<table>
<thead>
<tr>
<th>Traditional Skills and Attributes</th>
<th>Additional Skills and Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Willingness to learn</td>
<td>• Ability to prioritize</td>
</tr>
<tr>
<td>• Strong organizational skills</td>
<td>• Experience using the Internet</td>
</tr>
<tr>
<td>• Excellent oral and written</td>
<td>• Writing for different purposes,</td>
</tr>
<tr>
<td>communication skills</td>
<td>e.g. faxes and emails</td>
</tr>
<tr>
<td>• Ability to work on several</td>
<td>• Product and sector knowledge</td>
</tr>
<tr>
<td>tasks at a time (multitasking)</td>
<td></td>
</tr>
<tr>
<td>• Ability to work well with</td>
<td>• Knowledge of employment</td>
</tr>
<tr>
<td>people</td>
<td>standards legislation, health</td>
</tr>
<tr>
<td></td>
<td>and safety legislation, and</td>
</tr>
<tr>
<td></td>
<td>human rights legislation</td>
</tr>
<tr>
<td>• Good judgment</td>
<td>• Research skills</td>
</tr>
<tr>
<td>• Flexibility</td>
<td>• Personal initiative</td>
</tr>
<tr>
<td>• Professional appearance</td>
<td></td>
</tr>
<tr>
<td>• Business-like approach to</td>
<td></td>
</tr>
<tr>
<td>work</td>
<td></td>
</tr>
</tbody>
</table>
Learning Activity #2

Remember to write in complete sentences and check for correct spelling and grammar!

1. Which of the above skills are you familiar with? How do you perform them? Complete the following sentences, using two skills or attributes for each sentence that has been started for you. Provide as much detail as possible.

I am able to…

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

I am able to…

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
I know how to…

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

I know how to…

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

I have some experience…

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________
I have some experience…

__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

I need to learn more about…

__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

I need to learn more about…

__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
2. Write a cover letter to an employer describing your abilities to do the duties of a professional retail associate. Use some examples of additional skills as well as traditional skills. Write a minimum of ten sentences. Remember to provide a proper greeting and closing remark that shows professionalism and dedication to your future job.
Store Maintenance

Store maintenance is required in all stores. If you work in a small retail shop, one person may do many of the tasks. In larger stores, specific departments and the staff who work in those departments may divide the tasks up. In an optical store, the emphasis may be on spotless eyeglasses. In a grocery store, the emphasis may be on having the shelves stocked at all times.

Inventory

Inventory is the goods that a store has to sell. Inventory records are important so the business is able to track the dollar value of all their merchandise. Keeping inventory records also tells the store when to order more products. Once a product is sold, the records will be adjusted to show how many of that product remains in the store and if it needs to be reordered from the suppliers.

When goods arrive at the store, an invoice or packing slip will be included with the shipment. The invoice is a complete list of the merchandise, goods, or services sent to a buyer by the seller, which also includes quantity, price, and the amount owing. The packing slip may not have the price of the items or the total. The content of the shipment has to be verified using the invoice or packing slip. Once this is done, the goods are priced and the information is entered into the inventory program. The inventory program allows the retail staff to find information about what items are in stock, where they are located, and the price of each item.

The merchandise is then stocked on shelves or displayed on racks. It is important to display the goods according to the store guidelines. In a grocery store for example, the product labels should be facing outward so that the customers can see the front of the packages or cans. In clothing stores, sizes and similar items should be grouped together. This makes it easier for customers to find the item that they are looking for.
Learning Activity #3

After reading the invoice, complete the questions.

JOHNSON’S DESIGNER FASHIONS

Invoice

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Rate</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Girl’s dress size4</td>
<td>12</td>
<td>$19.99</td>
<td>$239.88</td>
</tr>
<tr>
<td>Girl’s dress size6</td>
<td>10</td>
<td>$19.99</td>
<td>$199.90</td>
</tr>
<tr>
<td>Girl’s dress size8</td>
<td>12</td>
<td>$19.99</td>
<td>$239.88</td>
</tr>
</tbody>
</table>

We always appreciate your business!

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-total:</td>
<td>$679.66</td>
</tr>
<tr>
<td>GST:</td>
<td>$47.58</td>
</tr>
<tr>
<td>PST:</td>
<td>$54.37</td>
</tr>
<tr>
<td>Balance:</td>
<td></td>
</tr>
</tbody>
</table>

Bill to:
123 Suppliers
888 Right Street
Cablecon, ON
P5T 4K4

1. How many dresses arrived in this shipment? _______________________

2. What is the price charged for each dress? _______________________

3. What is the total price charged for the entire shipment? ____________

4. Two of the dresses were soiled during shipping. What would you do?
   ____________________________________________________________________
   ____________________________________________________________________
   ____________________________________________________________________
   ____________________________________________________________________
   ____________________________________________________________________
Store Displays

Store displays play an important role in displaying and selling a store’s merchandise. Retail stores are competing for the customers’ dollars. Clear and professional looking signs and attractive window displays will bring in customers. Customers have many stores where they can shop. A messy storefront display may give the impression that the merchandise in the store is not top quality, and this may cause a customer to shop somewhere else.

Displays show-off the store’s merchandise. Some displays are permanent and usually stay in the same place. Glass jewelry cases require constant cleaning so that fingerprints and smudges don’t make the merchandise look unattractive. The front shelves of the grocery aisle usually carry the weekly features. Keeping the shelves stocked and neat in appearance can help make the products look more appealing. Clothes hung neatly and organized on the racks will assist the customer in finding the right size. The customer will appreciate being able to see the display without having to step around clutter.

Seasonal displays feature items for special occasions. They are temporary and will be changed often. Suppliers often have display units for their seasonal merchandise. These units could be cardboard pieces that have to be put together. They will come with instructions on how to assemble. Read directions carefully so your display is safe and sturdy.

Tips for making a display look great:

- Proper lighting
- Make the display attractive from all angles
- Keep displays clean and clutter-free
Learning Activity #4

Remember to write in complete sentences and check for correct spelling and grammar!

1. Think of three occasions that a store would have a seasonal display. What items could be in those displays?

a.

b.

c.
Customer Service Areas

Large retail stores will often have a customer service desk. A customer service desk will usually deal with providing general information, returns, exchanges, layaways and special orders.

Information

You will encounter a broad range of questions from customers.

- Do you sell hammers?
- Where are the washrooms located?
- Where do I find the children’s section?
- This toaster is defective. Can I get my money back?
- Will you be getting anymore sheet sets that were advertised for sale?
- I can’t find the matching cups to my dish set. Can I order them?
- I have a competitor store coupon for skates. Can I use it here?
- The table you have on display is chipped. Can I get a discount?
- Can I make a payment on my store credit card here?

You will have to be familiar with the store’s products and where they are located. If your store does not stock the item that the customer is looking for, provide information about where they can get the product. The customer will appreciate your helpfulness. It is important for you to know the store’s policies regarding returns and exchanges. Knowing how your store deals with price matching with competitors, details about special sales events and how to discount damaged merchandise will allow you to answer customer questions easily. You will also handle phone calls from customers looking for information. Your courteous manner when you deal with customers will encourage them to keep shopping at your store.

Other duties at the customer service desk may include re-tagging merchandise that has been returned and putting these items back in stock. Defective merchandise will need to be returned to the suppliers, and you may have the responsibility of issuing rain checks for sale merchandise that is out of stock.
Learning Activity #5

This is an example of a rain check issued for an out-of-stock item.

<table>
<thead>
<tr>
<th>Rain Check Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jacob’s Discount</td>
</tr>
<tr>
<td>As a result of not meeting the demand for the advertised merchandise, this rain check will entitle you to the following listed below. We will be pleased to notify you by telephone when the merchandise is available.</td>
</tr>
<tr>
<td>Item Description</td>
</tr>
<tr>
<td>Winter Sport Jacket</td>
</tr>
<tr>
<td>Rain check Date</td>
</tr>
<tr>
<td>April 28, 2004</td>
</tr>
<tr>
<td>Store No.</td>
</tr>
<tr>
<td>13</td>
</tr>
<tr>
<td>Div No.</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>Stock No.</td>
</tr>
<tr>
<td>45832-4530</td>
</tr>
<tr>
<td>Qty.</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>Size</td>
</tr>
<tr>
<td>large</td>
</tr>
<tr>
<td>Colour</td>
</tr>
<tr>
<td>black</td>
</tr>
<tr>
<td>Reg. Price</td>
</tr>
<tr>
<td>$79.99</td>
</tr>
<tr>
<td>Promo. Price</td>
</tr>
<tr>
<td>$39.99</td>
</tr>
<tr>
<td>Transaction Date</td>
</tr>
<tr>
<td>November 4, 2004</td>
</tr>
<tr>
<td>Name: Jamie Little</td>
</tr>
<tr>
<td>Address: 456 Any Street</td>
</tr>
<tr>
<td>City: Picton</td>
</tr>
<tr>
<td>Province: Ontario</td>
</tr>
<tr>
<td>Postal Code: K0K 2T0</td>
</tr>
<tr>
<td>Phone: 555-5666</td>
</tr>
</tbody>
</table>

The winter sports jackets that were out of stock have now arrived.

1. Write down the information that you will give the customer when you call to tell them that the merchandise is now in the store.
Clean up tasks

Having a well-maintained and clean store is good for business. The products look more attractive to the customers. It is just common sense to clean up a spill when it occurs, hang up a piece of clothing that has fallen, or wipe down a sticky counter. That kind of attitude will create a positive work environment.

Some clean-up tasks need to be completed on a regular basis. Most stores will have a clean-up duties checklist for their staff to follow. The types of clean-up duties will depend on what kind of store you are working in. Having a list will eliminate the problem of relying on the next person to complete the task or simply forgetting to do an assigned clean-up duty. Once the employee has completed the task, he/she is required to initial it and mark the time.

Here is an example of what a checklist might contain for a convenience store.

<table>
<thead>
<tr>
<th>Joyce’s Convenience Store Clean-up checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift start</td>
</tr>
<tr>
<td>Clean glass front door</td>
</tr>
<tr>
<td>Clean fridge and freezer glass doors</td>
</tr>
<tr>
<td>Wipe down drink dispensing area</td>
</tr>
<tr>
<td>Clean front counter</td>
</tr>
<tr>
<td>Dust shelves</td>
</tr>
<tr>
<td>Wash floor</td>
</tr>
<tr>
<td>Clean drink dispensing equipment</td>
</tr>
<tr>
<td>Organize newspaper and magazine racks</td>
</tr>
<tr>
<td>Clean bathroom</td>
</tr>
</tbody>
</table>
Learning Activity #6

1. You work at a medium-sized sporting goods store. Create a clean up duties checklist that is appropriate for your store. The list should include tasks that are done on a daily basis and tasks that are done weekly. Where would you post the checklist?
Schedules, Payroll, and Other Forms

Many positions available for retail associates will be shift work. Your supervisor will make a schedule for the staff. The schedule could be a weekly or monthly schedule. It is a good idea to copy the schedule so that you can refer to it when you are organizing your week. Another type of schedule that you may have to follow is a break schedule. This schedule is created so that all the employees are not on breaks at the same time.

Cashier Schedule

August 2 - 6, 2004

<table>
<thead>
<tr>
<th>Employee</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniel</td>
<td>9:00am-3:00pm</td>
<td>3:00pm-9:00pm</td>
<td>10:00am-6:00pm</td>
<td>3:00pm-9:00pm</td>
<td>9:00am-6:00pm</td>
</tr>
<tr>
<td>Lorraine</td>
<td>10:00am-6:00pm</td>
<td>9:00am-3:00pm</td>
<td>3:00pm-9:00pm</td>
<td>10:00am-6:00pm</td>
<td></td>
</tr>
<tr>
<td>James</td>
<td>9:00am-3:00pm</td>
<td>10:00am-6:00pm</td>
<td></td>
<td>3:00pm-9:00pm</td>
<td>9:00am-3:00pm</td>
</tr>
<tr>
<td>Sarah</td>
<td>3:00pm-9:00pm</td>
<td></td>
<td>9:00am-3:00pm</td>
<td>10:00am-6:00pm</td>
<td>3:00pm-9:00pm</td>
</tr>
<tr>
<td>Jennifer</td>
<td>9:00am-3:00pm</td>
<td>3:00pm-9:00pm</td>
<td>9:00am-3:00pm</td>
<td></td>
<td>9:00am-3:00pm</td>
</tr>
<tr>
<td>Doug</td>
<td>10:00am-6:00pm</td>
<td></td>
<td>9:00am-3:00pm</td>
<td>10:00am-6:00pm</td>
<td>10:00am-6:00pm</td>
</tr>
<tr>
<td>Michael</td>
<td>3:00pm-9:00pm</td>
<td>9:00am-3:00pm</td>
<td>3:00pm-9:00pm</td>
<td></td>
<td>3:00pm-9:00pm</td>
</tr>
<tr>
<td>Christina</td>
<td>3:00pm-9:00pm</td>
<td>10:00am-6:00pm</td>
<td>10:00am-6:00pm</td>
<td>9:00am-3:00pm</td>
<td>3:00pm-9:00pm</td>
</tr>
</tbody>
</table>
Learning Activity #7: Cashier Schedule

After reading the cashier schedule, complete the questions.

1. How many shifts are there in one day?

2. What are the longest and shortest shifts?

3. Which employees have the most shifts for this week?

4. Calculate the number of hours that each employee works for the week.

5. Which employees are scheduled the earliest on Thursday?

6. How many more hours of work does Daniel have than Sarah?
Learning Activity #8

Hours of Work – Relief Periods

<table>
<thead>
<tr>
<th>Shift</th>
<th>Total Hours</th>
<th>Lunch</th>
<th>Break</th>
<th>Paid Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 3:00</td>
<td>6</td>
<td>1/2</td>
<td>1 – 15 mins.</td>
<td>5.5</td>
</tr>
<tr>
<td>10:00 – 6:00</td>
<td>8</td>
<td>1/2</td>
<td>2 – 15 mins.</td>
<td>7.5</td>
</tr>
<tr>
<td>3:00 – 9:00</td>
<td>6</td>
<td>1/2</td>
<td>1 – 15 mins.</td>
<td>5.5</td>
</tr>
<tr>
<td>9:00 – 6:00</td>
<td>9</td>
<td>1/2</td>
<td>2 – 15 mins.</td>
<td>8.5</td>
</tr>
</tbody>
</table>

1. Which shift has the most hours?

2. According to the cashier schedule, how many hours does Daniel get paid for that week? Remember to subtract the amount of time given for lunches.

Automotive Centre

Period Ending April 28

<table>
<thead>
<tr>
<th>Employee</th>
<th>Sun</th>
<th>Mon</th>
<th>Tues</th>
<th>Wed</th>
<th>Thur</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rick</td>
<td>9:00 – 3:00</td>
<td>8:00 – 5:00</td>
<td>9:00 – 6:00</td>
<td>9:00 – 6:00</td>
<td>8:00 – 5:00</td>
<td>8:30 – 5:30</td>
<td></td>
</tr>
<tr>
<td>Donna</td>
<td></td>
<td></td>
<td>9:00 – 6:00</td>
<td>8:00 – 5:00</td>
<td>8:30 – 5:30</td>
<td>9:00 – 6:00</td>
<td>8:00 – 3:00</td>
</tr>
<tr>
<td>Erik</td>
<td>9:00 – 3:00</td>
<td>8:30 – 5:30</td>
<td>9:00 – 6:00</td>
<td>9:00 – 6:00</td>
<td>8:00 – 6:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jessica</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8:00 – 3:00</td>
</tr>
</tbody>
</table>
Learning Activity #9

Read the schedule and answer the following questions.

1. How many employees are scheduled to work Sunday?

2. On which days is Rick NOT scheduled to work?

3. What time does Erik start work on Tuesday?

4. Which department is this schedule for?

5. How many employees are scheduled to work Monday and Friday?
Time and Earnings

For most retail jobs, you will be paid by the hour. Your earnings depend on both the amount of hours you work and also the rate of pay you are receiving. To figure gross earnings, you do the following.

**Hourly rate of pay \([x]\) Hours worked \(\Rightarrow\) Gross Earnings**

Regular pay plus any other pay makes up the gross earnings. This is the total pay before payroll deductions are taken out.

**Example:** Jacqueline earns $7.15 an hour. She worked 30 hours this week. What are her gross earnings?

**Solution:** 7.15 \([x]\) 30 \(\Rightarrow\) 214.50

**Answer:** Jacqueline’s gross earnings for the week are $214.50.

**Learning Activity #10**

1. Using your calculator find the earnings of each example below.

   a. Hourly rate $21.56  
      Hours worked 5.25  
      Earnings

   b. Hourly rate $7.56  
      Hours worked 30.50  
      Earnings

   c. Hourly rate $7.15  
      Hours worked 20.00  
      Earnings

   d. Hourly rate $18.00  
      Hours worked 10.75  
      Earnings
Learning Activity #11

Using your calculator, find the gross earnings of each individual below. Remember to show all your work, and answer in full sentences!

1. Angela is working at a convenience store earning $7.15 an hour. Last week she worked a total of 23 hours. What are her gross earnings for that week?

   

2. Lisa is being paid $9.32 an hour as an assistant manager for a local retail store. She worked 32 hours one week and the following week she worked a total of 28 hours. What are her gross earnings for the two weeks?

   

3. Jason has just started a new job as a sales clerk at a convenience store, earning $7.16 an hour. He has worked a total of 21 hours all week and is expecting his first paycheck. What will his gross earnings be for that week?
**Regular Earnings**

For full time employees, a regular work week is between 35 to 40 hours. To find the total amount of regular pay you must:

**Hourly Rate \[\times\] Regular hours \[=\] Regular gross earnings

**Learning Activity #12**

Using your calculator, calculate each person’s regular weekly gross earnings, using the formula given above.

<table>
<thead>
<tr>
<th><strong>Employee</strong></th>
<th><strong>Hourly Rate</strong></th>
<th><strong>Hours Worked</strong></th>
<th><strong>Weekly Gross Earnings</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Butler, K.</td>
<td>$10.45</td>
<td>30.5</td>
<td></td>
</tr>
<tr>
<td>c. Gradulin, E.</td>
<td>$8.30</td>
<td>37.5</td>
<td></td>
</tr>
<tr>
<td>d. Sung, T.</td>
<td>$7.65</td>
<td>37.5</td>
<td></td>
</tr>
<tr>
<td>e. Metcalf, T.</td>
<td>$11.25</td>
<td>40</td>
<td></td>
</tr>
</tbody>
</table>
Over Time Earnings

When an hourly worker works more than the regular hours in a week, they are working “over time”. To calculate the number of over time hours, you must:

Total hours [-] regular hours [=] overtime hours.

Most employers pay time and a half for over time hours, meaning they pay 1.5 times the regular hourly rate.

To find the pay rate for over time work you:

Hourly rate [x] 1.5 [=] over time rate

Example: Jonathen Marks earns $7.35 per hour. He is paid time-and-a-half for overtime, what will be his overtime rate?

Solution: 7.35 [x] 1.5 [=] 11.03

Answer: Jonathen Marks earns $11.03 per hour for overtime.
### Learning Activity #13

1. Using the information given, fill in the rest of the form.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hourly Rate</th>
<th>Hours Worked</th>
<th>Gross Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Regular</td>
<td>Over time</td>
</tr>
<tr>
<td>a. Mark.</td>
<td>$10.56</td>
<td>52.0</td>
<td>40</td>
</tr>
<tr>
<td>b. Gabrielle</td>
<td>$7.89</td>
<td>32</td>
<td>25</td>
</tr>
<tr>
<td>c. Mike</td>
<td>$8.63</td>
<td>45</td>
<td>35</td>
</tr>
<tr>
<td>d. Hannah</td>
<td>$6.32</td>
<td>26</td>
<td>20</td>
</tr>
<tr>
<td>e. Louis</td>
<td>$9.12</td>
<td>35</td>
<td>32</td>
</tr>
<tr>
<td>f. Richard</td>
<td>$11.56</td>
<td>43</td>
<td>31</td>
</tr>
<tr>
<td>g. Craig</td>
<td>$10.89</td>
<td>31</td>
<td>26</td>
</tr>
<tr>
<td>h. Leanna</td>
<td>$7.65</td>
<td>46</td>
<td>33</td>
</tr>
<tr>
<td>i. Bridgett</td>
<td>$10.94</td>
<td>34</td>
<td>23</td>
</tr>
<tr>
<td>j. Jenn</td>
<td>$8.68</td>
<td>35</td>
<td>22</td>
</tr>
</tbody>
</table>

### Pay cheque: Earnings and Deductions

A pay stub is a sheet of paper that comes with your pay cheque stating the following information:

- Amount of money earned in a week
- Taxes and other deductions that were subtracted from gross pay.

To calculate how much money you take home (net earnings), you must use this formula:

\[
\text{Gross earnings} - \text{Taxes} - \text{Other deductions} = \text{Net earnings}
\]
Learning Activity #14

STATEMENT OF EARNINGS AND DEDUCTIONS

DETACH AND KEEP FOR YOUR TAX RECORDS

Larry’s Convenience      Employee:  Lorie Ferrington      SIN# 001-033-658

Cheque # 103651

<table>
<thead>
<tr>
<th>Hours Worked</th>
<th>Earnings</th>
<th>Income Tax</th>
<th>Other Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg 40.00</td>
<td>272.00</td>
<td>$75.46</td>
<td>E.I 8.08</td>
</tr>
<tr>
<td>OT 3.50</td>
<td>35.70</td>
<td></td>
<td>CPP 12.31</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Pay Period</th>
<th>Total Gross Earnings</th>
<th>Total Taxes</th>
<th>Total Other deductions</th>
<th>Net Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/19 – 09/25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Using the above pay-stub, calculate the missing totals at the bottom of the form. Then find the Net Earnings. Don’t forget to show all your work!

2. For regular hours, what is Lorie’s gross pay per hour? (Earnings \( \div \) Hours)
3. What is Lorie’s Gross pay per hour for over time (OT)?

4. Lorie contributes the same amount for her Employment Insurance each week. How much will she contribute in a year (52 weeks)?

5. Using a real example of a pay-stub, answer these questions on a separate piece of paper.
   a. Are there any OT hours?
   b. How many hours has this person worked?
   c. Whose name is on the pay-stub?
   d. Calculate gross pay per hour.
   e. List any deductions that are located on this pay-stub.

Other Forms

Some of the other forms that you need to become familiar with are:
- Vacation schedules
- Invoices
- Rain check certificates
- Bank deposit slips
- Accident report forms
Store Policies and Procedures

Every retail store will have policies and procedures for their staff to follow. These guidelines will determine how employees will deal with layaways, returns and exchanges, cash handling, and opening and closing procedures. When a new employee begins employment with a store, they are generally given a copy of store policies and procedures to read and learn.

Layaways

Some stores offer a layaway plan to their customers. This is a convenient method of payment for the customers. Having a layaway plan could be the reason why the customer chooses your store to make their purchases. A customer is able to purchase goods by making a down payment and then making weekly or monthly payments until the items are paid for. The retail store will hold the goods for the customer until all the payments are made.

A layaway agreement is a contract. The customer will sign this agreement. The agreement should include the following information:

- Name, address, and telephone number of the store and the customer.
- Transaction date.
- Itemized list of the goods.
- The service charge fee.
- Amount of down payment.
- Balance owed after each payment is made and dates that future payments are due.
- Length of time goods will be held.
- Your rights if you miss a payment.

The policies dealing with layaways can differ from store to store. Here are some examples:

- A customer will lose their deposit and money paid if they do not meet the payment schedule.
- Layaway policies must be posted at cash registers where layaway transactions take place.
- All layaways must be picked up and paid in full four days before Christmas.
- A 10% deposit is required with a layaway.
Returns and Exchanges

At large retail stores, returns and exchanges are usually handled at the customer service area. In smaller stores, the cashier will probably handle the returns. There are a variety of policies for returns and exchanges. They range from “100% Customer Satisfaction” to “No Returns”. Some stores will have the return policies visible at the cash registers, and some will print the policies on the customer receipt. Retail associates dealing with returns need to be fully aware of store policies.

Some examples of different return and exchange policies:

100% satisfaction guaranteed
   • Return the merchandise with the sales receipt, and the money will be refunded.

No refunds
   • Items can only be exchanged, or a store credit can be given.

Final Sale
   • Usually this is for clearance items. No refund, no exchange, no store credit.

Personal items
   • Personal items such as ladies’ or men’s undergarments cannot be returned.

Receipt or no receipt
   • If you have the receipt, you will receive the refund at the price printed on the receipt. If you don’t have a receipt, you will receive a refund for the amount of the current price of that item.

Cash Handling

Cash handling procedures and policies are put in place to prevent theft and for the employees’ safety. Some stores require that cashiers balance and empty their tills after 30 or 40 transactions. This is so that large amounts of money are not accessible. Cashiers are expected to follow procedures at the
cash register, such as never leaving an open cash drawer unattended. Another policy may be to display signs indicating that only limited amounts of cash are kept in the store.

Opening and Closing Procedures

All employees responsible for opening and closing their store should have access to written procedures. These policies are for employee safety as well as theft prevention.

1. When opening the store, make sure that there are no suspicious people around your store.

2. Check to make sure that no one has broken in. Inspect the outside of the building to see if there are any broken windows or doors. If there is evidence of a break-in, call the police and do not enter the store.

3. You should enter the store and immediately re-lock the door and turn off the alarm. Inspect the inside of the store for evidence of a break-in.

4. Remove cash drawers from locked area, and prepare cash registers for the day.

5. Unlock doors at specified opening time.

6. At closing time, make sure that all customers have left the store.

7. Lock the doors and windows. Remove cash drawers to locked area.

8. Set alarm. As you exit, make sure that there are no suspicious people in sight. Lock the door.
Money Math
The following is our Canadian currency:

One Cent = One Penny = $0.01
Twenty-five Cents = One Quarter = $0.25

Five Cents = One Nickel = $0.05
One Dollar = One Loonie = $1.00

Ten Cents = One Dime = $0.10
Two Dollars = One Toonie = $2.00

Five Dollars = One Five Dollar bill = $5.00
Ten Dollars = One Ten Dollar bill = $10.00
Twenty Dollars = One Twenty Dollar bill = $20.00
Fifty Dollars = One Fifty Dollar bill = $50.00

One Hundred Dollars = One Hundred Dollar bill = $100.00

**Learning Activity #1**

Write the money amount.

1. 
   ![Coins and bills]
   
   =

2. 
   ![Coins and bills]
   
   =

3. 
   ![Coins and bills]
   
   =
4. 

\[ \text{Canada} 1 \text{ cent} + \text{Canada} 5 \text{ cents} + \text{Canada} 10 \text{ cents} + \text{Canada} 1 \text{ dollar} + \text{Canada} 2 \text{ dollars} + \text{Canada} 5 \text{ dollars} + \text{Canada} 10 \text{ dollars} = \] 

5. 

\[ \text{Canada} 5 \text{ cents} + \text{Canada} 10 \text{ cents} + \text{Canada} 25 \text{ cents} + \text{Canada} 1 \text{ dollar} + \text{Canada} 5 \text{ dollars} + \text{Canada} 10 \text{ dollars} + \text{Canada} 20 \text{ dollars} = \] 

6. 

\[ \text{Canada} 5 \text{ dollars} + \text{Canada} 10 \text{ dollars} + \text{Canada} 20 \text{ dollars} + \text{Canada} 50 \text{ dollars} + \text{Canada} 100 \text{ dollars} = \] 

7. 

\[ \text{Canada} 10 \text{ dollars} + \text{Canada} 20 \text{ dollars} + \text{Canada} 50 \text{ dollars} + \text{Canada} 100 \text{ dollars} = \] 

8. 

\[ \text{Canada} 5 \text{ dollars} + \text{Canada} 50 \text{ dollars} + \text{Canada} 20 \text{ dollars} = \]
9. 

\[ \text{\$5} + \text{\$5} + \text{\$100} = \] 

= __________________________

10. 

\[ \text{\$10} + \text{\$10} + \text{\$50} = \] 

= __________________________

11. 

\[ \text{\$20} + \text{\$5} + \text{\$1} + \text{\$0.50} = \] 

= __________________________

12. 

\[ \text{\$10} + \text{\$50} + \text{\$0.50} = \] 

= __________________________
13.  

\[ \text{Canada} 100 \text{ dollars} + \text{Canada} 50 \text{ dollars} \]  

=  


14.  

\[ \text{Canada} 20 \text{ dollars} + \text{Canada} 20 \text{ dollars} + \text{Canada} 5 \text{ dollars} \]  

=  


15.  

\[ \text{Canada} 50 \text{ dollars} + \text{Canada} 20 \text{ dollars} + \text{Canada} 25 \text{ cents} \]  

=  

16.

= ____________________

17.

= ____________________

18.

= ____________________
Learning Activity #2

Show the amount of money in two different ways. Circle the most efficient, i.e. use the least amount of bills and coins! The first one is done for you

1. $0.67
   Two quarters, one dime, one nickel, two pennies.
   Six dimes, one nickel, two pennies

2. $0.98

3. $2.45

4. $12.54

5. $9.09

6. $18.91

7. $4.63
Learning Activity #3

Find the correct amount of change the customer would receive.

1. Cost: $9.69  Amount given: $20.00

2. Cost: $13.99  Amount given: $50.00

3. Cost: $37.89  Amount given: $40.00

4. Cost: $16.75  Amount given: $22.00

5. Cost: $8.39  Amount given: $10.40

6. Cost: $12.99  Amount given: $15.00

7. Cost: $63.88  Amount given: $80.00

8. Cost: $31.32  Amount given: $42.00
Learning Activity #4

Add the following money amounts.

1. $7.70
   + 2.20
   = $9.90
2. $5.44
   + 3.22
   = $8.66
3. $19.04
   + 33.33
   = $52.37
4. $8.85
   + 1.13
   = $9.98
5. $120.99
   + 29.11
   = $150.10
6. $87.44
   + 90.09
   = $177.53

Learning Activity #5

Subtract the following money amounts.

1. $56.76
   − 4.44
   = $52.32
2. $84.23
   − 41.22
   = $43.01
3. $79.18
   − 5.18
   = $74.00
4. $399.77
   − 88.54
   = $311.23
5. $209.43
   − 59.41
   = $150.02
6. $407.12
   − 312.11
   = $95.01
Writing Cents

There are two correct ways to express cents in numbers. For example, if you were to write fifty cents in numerical form, you could use either of the following forms: $.50 or 50¢. A common mistake is to express it as .50¢. The meaning of this is fifty-one hundredths of a cent or half a cent.

Write the following in numbers showing both correct methods.

**Learning Activity #6**

1. twenty-nine cents  ____  ____
2. sixty-five cents  ____  ____
3. fifty-one cents  ____  ____
4. thirteen cents  ____  ____
5. ninety-three cents  ____  ____
6. four cents  ____  ____
7. eighty-nine cents  ____  ____
8. fifty-five cents  ____  ____

**Learning Activity #7**

Circle the numbers that are written correctly.

1. $0.57 .57¢  2. $0.63¢  63¢
5. $1.99¢ $1.99  6. 45¢ .45¢
Learning Activity #8

Write each amount using a decimal. Remember to include the dollar sign!

1. thirty-five dollars and seventy-five cents
   ________________
2. eight dollars and two cents
   ________________
3. thirteen dollars and thirty cents
   ________________
4. seventy-five dollars and two cents
   ________________
5. forty-one dollars and eleven cents
   ________________
6. thirty dollars and eight cents
   ________________
7. sixty-three cents
   ________________
8. ninety dollars and nine cents
   ________________

Learning Activity #9

Write each amount in words.

1. $60.04
   __________________________ __________________________
2. $0.49
   __________________________ __________________________
3. $19.99
   __________________________ __________________________
4. $23.00
   __________________________ __________________________
5. $22.10
   __________________________ __________________________
6. $14.55

7. $59.03

8. $110.00
Place Value

As a retail associate, you need to have a good understanding of place value because you will be working with money all the time. Some other examples where the understanding of place value will become important are in calculating percentages, estimating figures, understanding GST and PST to name a few.

Whole Numbers

Place value is the value of a digit that is based on its position in a number. When you add, subtract, multiply, or divide whole numbers, you are working with numbers that are made up of digits. A digit is one of the following ten symbols used to write numbers: 0, 1, 2, 3, 4, 5, 6, 7, 8, and 9. For example, the number 5328 contains four digits: 5, 3, 2, and 8. Each digit in this number is located in a different place and therefore has a specific value.

The following place value chart shows the first four whole number place values. The number 5328 has been placed in the chart. The chart shows that the digit 8 is in the ones place, the digit 2 is in the tens place, the digit 3 is in the hundreds place, and the digit 5 is in the thousands place.

<table>
<thead>
<tr>
<th>Thousands</th>
<th>Hundreds</th>
<th>Tens</th>
<th>Ones</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>3</td>
<td>2</td>
<td>8</td>
</tr>
</tbody>
</table>

When a 0, or zero, appears in a number, it has 0 of whatever place value it falls into. The number 502, for example, has a 0 in the tens place. The digits 5 and 2 in the number 502 have place values of 5 hundreds and 2 ones. The number 502 has 0 tens.
Learning Activity #10

1. Write the place value of each underlined digit.
   
   a. \(\underline{63}\) = _____ 3 ones______
   b. \(\underline{534}\) = _______________
   c. \(\underline{278}\) = _______________
   d. \(\underline{4500}\) = _______________
   e. \(\underline{6792}\) = _______________
   f. \(\underline{712}\) = _______________
   g. \(\underline{100}\) = _______________
   h. \(\underline{1259}\) = _______________
   i. \(\underline{390}\) = _______________
   j. \(\underline{67}\) = _______________
   k. \(\underline{989}\) = _______________
   l. \(\underline{2398}\) = _______________

2. Write each of these numbers.
   
   a. 3 tens 1 one = _______________
   b. 6 tens 0 ones = _______________
   c. 3 hundreds 2 tens 2 ones = _______________
   d. 4 hundreds 0 tens 1 one = _______________
   e. 5 thousands 2 hundreds 3 tens 9 ones = _______________
   f. 9 thousands 0 hundreds 8 tens 7 ones = _______________

3. Write each digit as the correct place value.
   
   a. \(\underline{83}\) = ________________________
   b. \(\underline{375}\) = ________________________
   c. \(\underline{56}\) = ________________________
d. 6702 = _____________________
e. 9053 = _____________________

4. Compare each set of numbers. Write >, which represents greater than, <, which represents less than, or =, which represents equal to in each box. The first one is done for you.

a. 543 > 534
d. 39 □ 039
g. 987 □ 879

b. 267 □ 206
e. 7923 □ 7932
h. 750 □ 705

c. 877 □ 778
f. 212 □ 121
i. 90 □ 090
Decimals

Decimals are numbers used to show quantities less than 1 or quantities between 2 whole numbers. A decimal shows part of a whole number. Numbers to the right of the decimal point are used to show amounts less than 1. The chart below shows the value of a number in the first four decimal places.

<table>
<thead>
<tr>
<th>Decimal</th>
<th>Value</th>
<th>Place Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>.1</td>
<td>1/10</td>
<td>Tenths</td>
</tr>
<tr>
<td>.01</td>
<td>1/100</td>
<td>Hundredths</td>
</tr>
<tr>
<td>.001</td>
<td>1/1000</td>
<td>Thousandths</td>
</tr>
<tr>
<td>.0001</td>
<td>1/10,000</td>
<td>Ten-thousandths</td>
</tr>
</tbody>
</table>

The following place value chart shows the first four whole number place values and the first four decimal places. The number 305.2841 has been placed within the chart. The chart shows that the digit 3 is in the hundreds place, the digit 0 is in the tens place, the digit 5 is in the ones place, the digit 2 is in the tenths place, the digit 8 is in the hundredths place, the digit 4 is in the thousandths place, and the digit 1 is in the ten thousandths place.

<table>
<thead>
<tr>
<th>Thousands</th>
<th>Hundreds</th>
<th>Tens</th>
<th>Ones</th>
<th>Tenths</th>
<th>Hundredths</th>
<th>Thousands</th>
<th>Ten thousandths</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>0</td>
<td>5</td>
<td>#</td>
<td>2</td>
<td>8</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

Zeros And Decimals

Zeros can be added to the right of a decimal without changing the value of that number. The following are some examples.

\[ 8 = 8.0 \quad \$42 = \$42.00 \quad 7.3 = 7.300 \]
This will be important to remember when using a calculator and working with money as a retail associate. The following is an example.

On a calculator an answer may appear as 43.1
You must add the zero to the right so that it is 43.10
This would then translate to $43.10

Learning Activity #11

1. Decide if the decimals are equal. Write = or ≠ in each box.
   a. 0.03 □ 0.030
   b. 41.14 □ 41.41
   c. 7.07 □ 0.70
   d. 14 □ 14.04
   e. 19 □ 19.00
   f. 309 □ 390
   g. 99.9 □ 99.90
   h. 40.600 □ 40.6

2. Compare the decimals. Write >, <, or = in each box.
   a. 0.73 □ 0.83
   b. 0.50 □ 0.5
   c. 1.362 □ 1.363
   d. 8.08 □ 0.088
   e. 7.1 □ 7.01
   f. 60.6 □ 6.06
   g. 9 □ 9.00
   h. 1.5 □ 1.55
   i. 899.9 □ 899.89
   j. 44.4 □ 44.40

3. Order each group of numbers from least to greatest. Use 1 to represent the lowest number, through to 5 for the greatest number. For example, write 1 in the space next to the lowest number, and write 5 in the space next to the number that is the largest in the group.
<table>
<thead>
<tr>
<th></th>
<th>a. 7001</th>
<th>f. 8999</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7010</td>
<td>8989</td>
</tr>
<tr>
<td></td>
<td>7011</td>
<td>8988</td>
</tr>
<tr>
<td></td>
<td>7000</td>
<td>8998</td>
</tr>
<tr>
<td></td>
<td>7101</td>
<td>8899</td>
</tr>
<tr>
<td></td>
<td>b. 3590</td>
<td>g. 404</td>
</tr>
<tr>
<td></td>
<td>3599</td>
<td>440</td>
</tr>
<tr>
<td></td>
<td>3509</td>
<td>400</td>
</tr>
<tr>
<td></td>
<td>3510</td>
<td>444</td>
</tr>
<tr>
<td></td>
<td>3511</td>
<td>044</td>
</tr>
<tr>
<td></td>
<td>c. 263</td>
<td>h. 11.1</td>
</tr>
<tr>
<td></td>
<td>326</td>
<td>18.9</td>
</tr>
<tr>
<td></td>
<td>362</td>
<td>11.9</td>
</tr>
<tr>
<td></td>
<td>236</td>
<td>18.2</td>
</tr>
<tr>
<td></td>
<td>322</td>
<td>11.8</td>
</tr>
<tr>
<td></td>
<td>d. 345</td>
<td>i. 6099</td>
</tr>
<tr>
<td></td>
<td>335</td>
<td>6900</td>
</tr>
<tr>
<td></td>
<td>354</td>
<td>6090</td>
</tr>
<tr>
<td></td>
<td>353</td>
<td>6910</td>
</tr>
<tr>
<td></td>
<td>355</td>
<td>6999</td>
</tr>
<tr>
<td></td>
<td>e. 2001</td>
<td>j. 54407</td>
</tr>
<tr>
<td></td>
<td>2101</td>
<td>5407</td>
</tr>
<tr>
<td></td>
<td>2010.1</td>
<td>54047</td>
</tr>
<tr>
<td></td>
<td>2100.0</td>
<td>5470.4</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>57044</td>
</tr>
</tbody>
</table>
Rounding Decimal Numbers

When multiplying and dividing, some answers may show many decimal digits. When this happens you will have to round your answer to the nearest hundredth, tenth, or whole number. The following are some pointers to help you round correctly.

- Look at the next digit after the place you need
- If the number is 5 or more, round your place up to the next higher digit
- If the number is 4 or less, keep the digit to the left the same
- Drop all the digits to the right of the place that you don’t need

The following are some examples of rounding off. When rounding to two decimal places, or, in money, rounding to the nearest cent:

10.373 rounds off to 10.37
10.379 rounds up to 10.38
10.376 rounds up to 10.38
0.099 rounds up to 0.10
2.90 rounds off to 2.90
19.99 rounds up to 20.00

The following are examples when rounding to the nearest dollar:

20.499 rounds off to 20
20.659 rounds up to 21
20.699 rounds up to 21
Learning Activity #12

1. Rewrite the numbers below as dollars and cents, rounding to the nearest cent. Don’t forget to add the dollar sign, ($), in the correct place!
   a. 293.568 = _____________  f. 89.568 = _____________
   b. 359.210 = _____________  g. 4.232 = _____________
   c. 8.26 = _____________    h. 78.325 = _____________
   d. 45.238 = _____________  i. 27.888 = _____________
   e. 6.245 = _____________   j. 5.877 = _____________

2. Rewrite the numbers below rounding to the nearest dollar. Remember to add the dollar sign in the correct place.
   a. 31.35 = _____________  f. 41.05 = _____________
   b. 101.99 = _____________  g. 1009.87 = _____________
   c. 4.61 = _____________    h. 73.49 = _____________
   d. 81.50 = _____________  i. 50.51 = _____________
   e. 29.53 = _____________   j. 409.88 = _____________
Percents At Work

Percents are the same as decimals in that they show parts of something. Percent means parts out of 100, so a whole percent stands for hundredths. For example, 99% means the same as 0.99. Look at the equivalents below. You will begin to see a pattern.

<table>
<thead>
<tr>
<th>Percent</th>
<th>Decimal</th>
</tr>
</thead>
<tbody>
<tr>
<td>From 1% to 100%</td>
<td></td>
</tr>
<tr>
<td>1 percent = 1%</td>
<td>= 0.01</td>
</tr>
<tr>
<td>10 percent = 10%</td>
<td>= 0.10</td>
</tr>
<tr>
<td>100 percent = 100%</td>
<td>= 1.00</td>
</tr>
<tr>
<td>More than 100%</td>
<td></td>
</tr>
<tr>
<td>101 percent = 101%</td>
<td>= 1.01</td>
</tr>
<tr>
<td>110 percent = 110%</td>
<td>= 1.10</td>
</tr>
<tr>
<td>200 percent = 200%</td>
<td>= 2.00</td>
</tr>
<tr>
<td>Less than 1%</td>
<td></td>
</tr>
<tr>
<td>½ percent = 0.5%</td>
<td>= 0.005</td>
</tr>
<tr>
<td>¼ percent = 0.25%</td>
<td>= 0.0025</td>
</tr>
</tbody>
</table>

Equivalent Percents And Decimals

To find equivalent percents and decimals, you can convert them in your head. Below is a simple way to do this.

Percent to decimal: Divide by 100  \[ \rightarrow \] 43% is \( \frac{43}{100} = 0.43 \)

Decimal to percent: Multiply by 100  \[ \rightarrow \] 0.43 is \( .43 \times 100 = 43\% \)
Learning Activity #13

1. Write each percent as a decimal. Do not use a calculator! The first one is done for you.
   a. 19% \(= \frac{19}{100} = .19\)  
   b. 15% \(= \quad\)  
   c. 25% \(= \quad\)  
   d. 37% \(= \quad\)  
   e. 75% \(= \quad\)  
   f. 55% \(= \quad\)  
   g. 61% \(= \quad\)  
   h. 80% \(= \quad\)  
   i. 33% \(= \quad\)  
   j. 8% \(= \quad\)

2. Write each decimal as a percent. Remember, do not use your calculator! The first one is done for you.
   a. 0.25 \(= .25 \times 100 = 25\%\)  
   b. 0.85 \(= \quad\)  
   c. 0.32 \(= \quad\)  
   d. 0.45 \(= \quad\)  
   e. 0.01 \(= \quad\)  
   f. 0.70 \(= \quad\)  
   g. 0.55 \(= \quad\)  
   h. 0.63 \(= \quad\)  
   i. 0.99 \(= \quad\)  
   j. 0.06 \(= \quad\)

Sales Tax

The sales tax is applied to the price of a consumer good that is purchased. The retail store or service establishment must charge the sales tax for the goods and services they sell and then send it to the government.

Most often a cash register or a computer will figure the tax rate for you. This lesson will show you how to work with sales tax using your calculator!
**Finding The Sales Tax**

The sales tax on an item is a percentage of the sales amount. To calculate the tax simply, multiply the sales amount by the tax rate.

\[
\text{Sales Amount} \times \text{Tax Rate} = \text{Sales Tax}
\]

With your calculator you do not need to change the tax rate from a percent to a decimal. You can use the [%] key, and it will do it all automatically for you! You also don’t have to press the equal key because the calculator already displays the answer when working with the percent function.

**Example**: What is the 7% sales tax on a sweatshirt that is priced at $65.24?

**Solution**: \[c\] 65.24 \[\times\] 7 \[%\] 4.57

**Answer**: The sales tax on the sweatshirt is $4.57.

**Learning Activity #14**

1. Calculate the sales tax on the following items. Round to the 2\(^{nd}\) decimal place.

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th>5% Sales Tax</th>
<th>6% Sales Tax</th>
<th>7% Sales Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>$50.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b.</td>
<td>$3.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c.</td>
<td>$2.12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d.</td>
<td>$9.35</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.</td>
<td>$624.95</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f.</td>
<td>$11,956</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g.</td>
<td>$123.456</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. What have you learned by filling out this chart?
3. Are there any similarities? Differences?

4. Why do you think retailers put sales tax on their merchandise?
Adding the Sales Tax

To find the total including tax, you must first figure the tax, and then add on the sales tax to get the total amount due.

Sales [x] Tax Rate [%] Sales tax [+] [=] Total

Your calculator should remember the sales amount, allowing you to add the tax without clearing!

Learning Activity #15

1. Use a calculator to figure the sales tax. Then add the subtotal and the sales tax on to get the total amount due!

   a. $38.75 
      \[\times 0.04\] 
      \[\underline{\text{Subtotal}}\] 
      \[\text{4% sales Tax} \] 
      \[\underline{\text{Sales Tax Amount}}\] 
      \[\underline{\text{Total Amount Due}}\] 
   
   b. $23.85 
      \[\times 0.05\] 
      \[\underline{\text{Subtotal}}\] 
      \[\text{5% sales Tax} \] 
      \[\underline{\text{Sales Tax Amount}}\] 
      \[\underline{\text{Total Amount Due}}\] 
   
   c. $3.50 
      \[\times 0.07\] 
      \[\underline{\text{Subtotal}}\] 
      \[\text{7% Sales Tax} \] 
      \[\underline{\text{Sales Tax Amount}}\] 
      \[\underline{\text{Total Amount Due}}\] 
   
   d. 200.00 
      \[\times 0.06\] 
      \[\underline{\text{Subtotal}}\] 
      \[\text{6% Sales Tax} \] 
      \[\underline{\text{Sales Tax Amount}}\] 
      \[\underline{\text{Total Amount Due}}\]
2. Using the price list below find out the subtotal, sales tax, and total amount to be paid. The Sales Tax is 7%.

<table>
<thead>
<tr>
<th>Merchandise</th>
<th>Price</th>
<th>Merchandise</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-shirts</td>
<td></td>
<td>Hats</td>
<td>Adult $25.00</td>
</tr>
<tr>
<td>Female</td>
<td>$30.00</td>
<td>Youth</td>
<td>$25.00</td>
</tr>
<tr>
<td>Male</td>
<td>$30.00</td>
<td>Child</td>
<td>$15.00</td>
</tr>
<tr>
<td>Youth</td>
<td>$25.00</td>
<td>CD’S (nature Sounds) $21.36</td>
<td></td>
</tr>
<tr>
<td>Child</td>
<td>$15.26</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweat shirts</td>
<td></td>
<td>Charm Bracelet</td>
<td>$21.45</td>
</tr>
<tr>
<td>Female</td>
<td>$80.36</td>
<td>Purse</td>
<td>$7.00</td>
</tr>
<tr>
<td>Male</td>
<td>$80.59</td>
<td>Canteen</td>
<td>$2.50</td>
</tr>
<tr>
<td>Youth</td>
<td>$60.56</td>
<td>Landscape Paint set $41.00</td>
<td></td>
</tr>
<tr>
<td>Post Cards</td>
<td>$0.89</td>
<td>Flash light</td>
<td>$22.32</td>
</tr>
<tr>
<td>Key chains</td>
<td>$5.23</td>
<td>Jig saw puzzle</td>
<td>$5.00</td>
</tr>
<tr>
<td>Lil Figurines</td>
<td>$8.12</td>
<td>Diary</td>
<td>$22.59</td>
</tr>
<tr>
<td>Posters</td>
<td>$15.78</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. Alanna purchased 2 posters, an adult hat, female and male t-shirts, and a landscape paint set.

   Subtotal:   $__________
   Sales Tax:  $__________
   Total Due:  $__________

b. Ms. Bernard was on a vacation and stopped in at Joe’s Tourism Store. She bought a new purse, a charm bracelet, 4 Lil figurines, a CD, and two youth hats.

   Subtotal    $__________
   Sales Tax   $__________
   Total Due   $__________
Provincial Sales Tax (PST)

The PST is the tax collected by the provincial government. In Ontario, there is an 8% retail sales tax on most goods and services. Other provinces may charge a different rate of retail sales tax. Some goods and services are taxed at a higher or lower rate. For example, liquor sold in a licensed bar is taxed at 10%; a hotel room is taxed at 5%; and beer bought through a retail store will be taxed at a PST rate of 12%. There are some goods and services such as food for human consumption that are exempted from the PST. A complete listing of rates applied to goods and services and exemptions can be found in the Ontario Retail Sales Tax Act on the Government of Ontario website at http://www.gov.on.ca/.

Goods and Services Tax (GST)

The GST is the tax collected by the federal government. The GST is a 7% tax collected on most goods and services. Other goods and services are taxed at 15%, or are exempt from the GST. Information on the GST, including the rate that goods and services are taxed at, as well as exemptions can be found on the Canada Revenue Agency site http://www.cra-arc.gc.ca/.

With an 8% PST and a 7% GST, we can expect to pay a total tax of 15% on most goods and services that we purchase. The taxes will be listed separately on the receipt.

Most cash registers will calculate the taxes automatically. Older cash registers may require the cashier to select a TAX key that has already been preset with the correct tax rate.
Learning Activity #16

1. Use at least three receipts and find the following information.

<table>
<thead>
<tr>
<th></th>
<th>Store #1</th>
<th>Store #2</th>
<th>Store #3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Store Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Goods Purchased</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Sale Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Any Discounts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. PST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. GST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Credit, debit, cash payment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Did all of the receipts have the above information on them?
3. List any similarities you noticed on the receipts.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. List any differences you noticed on the receipts.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________


Find out:
   a) What percentage is charged for PST?  _______________________

   b) What percentage is charged for GST?  _______________________

   c) What are some of the exceptions or exemptions to the taxes?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Exchange Rate

Whether it is tourists visiting or truckers passing through, Canadian retail stores welcome American dollars. Some stores in tourist areas depend on them. However, the value of the Canadian dollar and the American dollar are not the same. Retail establishments and service industries need to be able to exchange American dollars for Canadian funds.

The exchange rate is the value of the Canadian dollar against the currency of other countries. On each business day, the Bank of Canada establishes the exchange rate. There is a specific rate to exchange American dollars to Canadian dollars.

Most stores will post the exchange rate so that customers are aware of the rate at the time of purchase. Some stores will change the rate daily according to the rate charged by the Bank of Canada; others will change the rate on a weekly or monthly basis.

Depending on the store’s cash register system, the transaction of exchanging money may be as simple as selecting “American funds tendered” from a menu selection. However, you may have to calculate and change the American money using the exchange rate.

Example:

American dollars (multiply by) current exchange rate = Canadian dollars

\[
$20.00 \times 1.3300 = $26.60
\]
Learning Activity #17

1. Using the current exchange rate listed, change American money into Canadian dollars. Round to the 2nd decimal place.

<table>
<thead>
<tr>
<th>Current Exchange rate</th>
<th>American dollars</th>
<th>Canadian dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 1.4433</td>
<td>$10.00</td>
<td>$14.43</td>
</tr>
<tr>
<td>b. 1.2906</td>
<td>$45.00</td>
<td>$58.62</td>
</tr>
<tr>
<td>c. 1.3001</td>
<td>$36.00</td>
<td>$46.80</td>
</tr>
<tr>
<td>d. 1.2252</td>
<td>$20.00</td>
<td>$24.50</td>
</tr>
<tr>
<td>e. 1.4111</td>
<td>$18.25</td>
<td>$25.63</td>
</tr>
</tbody>
</table>

2. A customer pays for his purchase with American money. How much money will he get back in Canadian funds? The exchange rate is 1.2942.

<table>
<thead>
<tr>
<th>Purchase Total</th>
<th>Amount returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. $80.00</td>
<td>$63.54</td>
</tr>
<tr>
<td>b. $100.00</td>
<td>$89.40</td>
</tr>
<tr>
<td>c. $10.00</td>
<td>$12.94</td>
</tr>
<tr>
<td>d. $33.00</td>
<td>$42.64</td>
</tr>
<tr>
<td>e. $50.00</td>
<td>$64.70</td>
</tr>
</tbody>
</table>
Cash, Cheques, Credit and Debit Cards

Cashier Procedures and Cash Handling Policies

Every retail operation has its own cash handling policy or set of procedures which cashiers are expected to follow. This part of your job will be very important, as it is part of the sales transactions and money aspect of the store. Your employer will want to make sure that employees are reliable, honest, and ethical people. On a typical day a cashier’s duties will include the following:

- Be assigned to a register at the beginning of her/his shift and given a drawer containing money
- Count her/his float to ensure that it contains the correct amount of money and adequate supplies of change and small bills
- Either manually enter into a cash register the price of each item or use a scanner connected to a computer
- Count the drawer’s contents and compare the total with sales data at the end of the shift
- Separate and total change forms, return slips, coupons, and other non-cash items
- Handle returns and exchanges
- Enter charges for all items and subtract the value of any coupons or special discounts
- Request additional identification from the customer or call in for an authorization for cheques
- Verify the age of customers purchasing alcohol or tobacco
- Issue a receipt to the customer and return the appropriate change
• Wrap or bag the purchase

A cashier’s duties will vary depending on the store. The following are examples of different retail operational responsibilities:

• A supermarket cashier might be responsible for weighing produce and bulk items and returning unwanted items

• A convenience store cashier might use a variety of machines other than cash registers and fill out orders according to the store’s needs

• A movie theater or ticket agency cashier might operate ticket-dispensing machines and answer a lot of movie related questions

• Gaming change people and booth cashiers in casinos exchange coins and tokens. They may also operate a booth in the slot-machine area and supply change persons with money at the start of the shift, or count and audit money in drawers

• A bookseller cashier may be responsible for selling a discount card

• A department store cashier may not be responsible for processing any returns or exchanges. This may occur in a separate area by other staff.

The general process for the cashier in retail during the point of sale (POS) transaction is the following:

• Greet the customer in a friendly manner when they are approaching the cash register area

• Make sure that the customer is satisfied with his/her experience at the store. One way that many retailers do this is by having employees ask the customer a question such as, “Have you found everything you were looking for today?”

• Process the sale which generally involves the following steps:
  • identify the price of the goods, services, or admissions using calculator,
cash register, or optical price scanner devices

- calculate the total sale and tell the customer the total bill
- receive the form of payment, i.e. cash, cheque, credit or debit card
- finalize the transaction by returning to the customer the correct change or credit card and their receipt
- wrap or place merchandise in bags
- provide any relevant information to the customer; for example, specific return or exchange policies or an upcoming sale in the store

Every retailer will have very particular guidelines for cashier procedures. This is a very important part of the job. The following points are general guidelines that will most likely be a part of what is expected from you in a retail business:

- Only assigned associates may operate the cash register during specific shifts. The assigned associate is totally responsible for the cash drawer.

- If you are assigned to the cash, you must count your cash drawer before the shift to verify the correct float amount.

- You must count your cash drawer after your shift in order to balance the cash accurately. Another associate or supervisor will verify the amounts in the cash drawer with you at the end of your shift by checking your calculations.

- At the end of your shift, calculate total payments received and verify this with your total sales.

- For your safety, it is important that you always keep your cash register drawer closed, except when making cash transactions.

- It is important that you always complete each sale separately and close the cash drawer after each transaction. This will decrease errors with your cash transactions.
• It is very important that you always complete each sale immediately. Do not put money aside to be entered at a later time and never combine sales transactions.

• Never make change from the cash drawer for yourself.

• Never cash your own or another associate’s pay cheque of any kind.

• Never use personal credit cards or debit cards in exchange for cash from the employer’s funds.

• U.S. money collected from customers becomes the property of the employer and must be deposited into the bank. Associates cannot sell, buy, or exchange U.S. money for their personal gain.

• During particularly busy times, make frequent drawer skims/pick-ups. Your employer will specify an amount that your cash drawer should not exceed. For example, you should never have any more than $400 in your cash drawer unless a different amount has been authorized.

• Your cash must balance to plus or minus $2 at the end of your shift.

Most retail stores will train cashiers on the job. New employees may spend their first day observing other employees and seeing how the store generally operates. The store manager will then assign trainees to a register with an employee. This employee will guide and show the new employee the different components of the cash register system.
Learning Activity #18

Remember to write in complete sentences and check for correct spelling and grammar!

1. What are the duties of a cashier? Describe in detail the different parts of a typical day for a cashier.

Money

When you purchase something, how do you pay? It used to be easy. First, there was cash. Then, we could use a personal cheque. Cheques were considered to be the same as cash. Then came the credit card, and we would be asked, “Will that be cash or charge?” Credit cards let us purchase items and pay later. Some stores have a layaway system that allows you to do the same thing. Except with credit cards, if you don’t pay off your monthly bill, you pay interest on your purchase price. Now, we can also use a debit card. It looks like a credit card, but it works like cash. When we purchase an item, the cash is immediately removed from our bank account. Then there are all of the “special” credit cards that you can only use in particular stores like Canadian Tire or The Bay. These also charge interest on all of your purchases.
Cash

Money is very important in our society. When you are calculating how much is in a cash drawer, you have to be extra careful to be accurate. Here is a fast and simple way to find the total, making sure of accuracy at the same time.

Learning Activity #19

1. Sort the coins and bills into separate piles.
2. Find the amount for each kind of money.
3. Add up these amounts to find the total of your cash.

1. Find the amount of coins, and bills (currency) in the cash drawer. Then find the total. Try not to use a calculator.

<table>
<thead>
<tr>
<th>Value</th>
<th>Number</th>
<th>$Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennies</td>
<td>$ 0.01</td>
<td>89</td>
</tr>
<tr>
<td>Nickels</td>
<td>$ 0.05</td>
<td>60</td>
</tr>
<tr>
<td>Dimes</td>
<td>$ 0.10</td>
<td>50</td>
</tr>
<tr>
<td>Quarters</td>
<td>$ 0.25</td>
<td>20</td>
</tr>
<tr>
<td>Loonies</td>
<td>$ 1.00</td>
<td>32</td>
</tr>
<tr>
<td>Toonies</td>
<td>$ 2.00</td>
<td>16</td>
</tr>
<tr>
<td>Fives</td>
<td>$ 5.00</td>
<td>15</td>
</tr>
<tr>
<td>Tens</td>
<td>$10.00</td>
<td>4</td>
</tr>
<tr>
<td>Twenties</td>
<td>$20.00</td>
<td>3</td>
</tr>
</tbody>
</table>

Total coins and currency: $
Cash Register and Cashing Out

A cash register tape is used as a record of sales and transactions. Here you will prove that your cash amounts match with the register tape.

Learning Activity #20

1. Using your calculator fill in the missing amounts. Follow these steps, using this Transaction Summary Sheet.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coins (total)</td>
<td>$ 10.89</td>
</tr>
<tr>
<td>Currency (total)</td>
<td>$ 525.00</td>
</tr>
<tr>
<td>Cheques, debit and credit card transactions (total)</td>
<td>$ 256.65</td>
</tr>
<tr>
<td>Total cash in drawer</td>
<td></td>
</tr>
<tr>
<td>plus cash paid out</td>
<td>$ 25.00</td>
</tr>
<tr>
<td>Total cash in drawer</td>
<td></td>
</tr>
<tr>
<td>minus opening amount</td>
<td>$ 200.00</td>
</tr>
<tr>
<td>Cash Received</td>
<td></td>
</tr>
<tr>
<td>Cash received (register tape)</td>
<td>$ 617.54</td>
</tr>
<tr>
<td>Difference</td>
<td></td>
</tr>
</tbody>
</table>

If your cash balances, the difference will be zero. When the amount is more than the cash register tape, you are over. When your difference is less than the cash register tape, you are short.
Deposit Slips

Cheques received by businesses will go into a chequing account. To deposit money, you must first fill out a deposit slip. Here is an example of one.

<table>
<thead>
<tr>
<th>Deposit all accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Bank</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>cheques and coupons</th>
<th>cash</th>
</tr>
</thead>
<tbody>
<tr>
<td>x1</td>
<td></td>
</tr>
<tr>
<td>x2</td>
<td></td>
</tr>
<tr>
<td>x5</td>
<td></td>
</tr>
<tr>
<td>x10</td>
<td></td>
</tr>
<tr>
<td>x20</td>
<td></td>
</tr>
<tr>
<td>x</td>
<td></td>
</tr>
<tr>
<td>x</td>
<td></td>
</tr>
<tr>
<td>x</td>
<td></td>
</tr>
<tr>
<td>coin</td>
<td></td>
</tr>
</tbody>
</table>

Cheques and coupons brought forward received in cash which is deducted from this deposit

<table>
<thead>
<tr>
<th>signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>deposits initials</td>
</tr>
<tr>
<td>total</td>
</tr>
</tbody>
</table>

1. Print the company account number here.
2. Print the date here.
3. Print your name here.
4. If you have money in the form of a cheque, print the amount here. (If you have more than one cheque, then print each amount on a separate line.)
5. Print the total amount for cheques here.
6. Print the amount for cash and coin here.
7. You will not use this section.
8. Add the amount of cheques, to the amount of cash and print the total here.
9. Sign your name here.
10. Print the total amount of money you are depositing here.
11. Write your initials here, so the bank knows who deposited the money.
Learning Activity #21

Fill out the blank deposit sheet on the next page with the information given in part a.

a.

<table>
<thead>
<tr>
<th>Cash</th>
<th>Cheques</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Coins</strong></td>
<td><strong>Currency</strong></td>
</tr>
<tr>
<td>10 pennies</td>
<td>9 loonies</td>
</tr>
<tr>
<td>15 nickels</td>
<td>3 toonies</td>
</tr>
<tr>
<td>6 dimes</td>
<td>8 fives</td>
</tr>
<tr>
<td>10 quarters</td>
<td>7 tens</td>
</tr>
<tr>
<td></td>
<td>6 twenties</td>
</tr>
<tr>
<td>Deposit All accounts</td>
<td>Your Bank</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Account #</td>
<td>Date</td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Cheques &amp; coupons</td>
<td>Cash</td>
</tr>
<tr>
<td></td>
<td>X1</td>
</tr>
<tr>
<td></td>
<td>X2</td>
</tr>
<tr>
<td></td>
<td>X5</td>
</tr>
<tr>
<td></td>
<td>X10</td>
</tr>
<tr>
<td></td>
<td>X20</td>
</tr>
<tr>
<td></td>
<td>coin</td>
</tr>
<tr>
<td>Cheques coupons</td>
<td></td>
</tr>
<tr>
<td>brought forward</td>
<td></td>
</tr>
<tr>
<td>Received in cash</td>
<td></td>
</tr>
<tr>
<td>which is deducted</td>
<td></td>
</tr>
<tr>
<td>from this deposit</td>
<td></td>
</tr>
<tr>
<td>Signature</td>
<td></td>
</tr>
<tr>
<td>Deposit Initials</td>
<td>Total</td>
</tr>
</tbody>
</table>
Parts of a Cheque

1. Name, address, and phone number of person writing cheque
2. Name of person (or place) to whom cheque is being written
3. Month, day, and year on which cheque was written
4. Bank identification number
5. Cheque number
6. Name and Address of bank
7. What cheque was written for
8. Amount of cheque (written out in words)
9. Signature of person writing cheque
10. Amount of cheque in numbers
Learning Activity #22

Fill in the cheque using the following information

---

John Hudson lives at 302 Grove Ave., Toronto, ON L9P 6E3. His telephone number is (567) 345-2323. He opened a new chequing account on Monday, September 16, 2004 at the Bank of Montreal. Using the first cheque from his chequebook the next day, he bought $83.00 worth of groceries at the ABC Supermarket.
Credit and Debit Cards

The Reason Why Credit and Debit Cards are Used

In today’s marketplace, customers expect to have the option of using credit or debit cards when they purchase goods and services. This option allows the customer to make purchases without carrying around large sums of money. A store that does not offer these methods of payment risks losing sales to other retailers that do provide this service. Staying competitive with other stores, avoiding bad cheques, and not having large amounts of cash on hand are benefits to the store.

The Difference Between Credit and Debit Cards

Banks issue debit cards. They are directly linked to the customer’s bank account. When customers use their debit card, their payment is automatically deducted from their bank account and moved to the store’s bank account. The debit card is swiped through a reader; the customer enters the relevant information on the card reader keyboard. The customer is not required to sign any transaction. The sales transaction will not be completed if the funds are not available in the customer’s account.

Credit card companies issue credit cards. VISA, MASTERCARD, and AMERICAN EXPRESS are just a few of the credit cards that are available. As well, there are special credit cards that can only be used in particular stores such as “Canadian Tire”, “Sears” or “The Bay”. This method of payment allows the customer to have a “pay later” option. The credit card company will bill the customer directly for the payment. Interest charges will be applied if the customer does not pay within a certain time limit. The customer is required to sign the transaction when using a credit card.
The Transaction

Debit Card

1. Cashier or customer swipes the debit card through a reader.
2. The cashier enters the sales information.
3. The customer uses the card reader keyboard to enter required information.
4. The transaction is either approved or denied.
5. If the transaction is approved, a receipt is given to the customer.

Credit Card

1. Cashier swipes the credit card through a reader.
2. The reader automatically dials an authorization centre.
3. The transaction is either approved or denied.
4. If the transaction is approved, the customer will sign the credit card transaction receipt.
What do credit and debit cards look like?

Credit Card - Front

Bank Name

Account Information Numbers

Expiration date of the card

Expiration end

of

Name of Card Holder

Card Type

Debit Card - Front

Bank Name

Your account identification number

Type of Card

Back (both)

Magnetic strip that holds your account information and personal identity.

Signature of the cardholder

Signature

Use of this card is governed by the terms of the bank, Cardholder agreement, of which the cardholder acknowledges receipt by such use. This card is the property of the bank and must be returned upon request,

Scotia card customer service

Toronto (416)701-7200

Canada/USA 1-800-4-scotia (1-800-472-6842)

TTY/DD Service only 1-800-645-0288
Learning Activity #23

Answer the following statements by circling True or False.

1. T F Customers always prefer to pay cash for their purchases.

2. T F Debit card payments are deducted from the customer’s bank account.

3. T F Credit card payments are deducted from the customer’s bank account.

4. T F The customer must sign the credit card transaction.

5. T F Every store offers its own version of credit cards.

6. T F Interest charges apply to both credit and debit card purchases.
Health and Safety

In this unit, you will learn about the laws that protect workers in Ontario. These laws include employment standards, human rights, health and safety, and workers’ compensation.

Real stories…

Did you know? While the typical vacation for North American workers is two weeks, many European governments have laws that give workers longer vacations. French employers must give workers 25 vacation days per year. German workers can take up to 24 days. In Spain, workers have 22 days. Employers in Belgium, Ireland, and the Netherlands provide 20 days, and in the U.K., vacations are from 15 to 20 days.

Source: Society for Human Resource Management, 2000

Learning Activity #1: Discussion

Discuss each of the following situations.

1. John had a 15-minute coffee break in the morning and another in the afternoon for the past year. Recently, his employer reduced the breaks to ten minutes each. Can the employer do this?

2. Anne was asked to wear black pants and a white top while working as a server at a restaurant. Can the employer do this?
Laws that Protect Workers in Ontario

The Ontario Ministry of Labour is responsible for labour laws in Ontario. These laws describe the rights and responsibilities of employers and workers in this province.

Ontario’s Employment Standards Act does not apply to industries regulated by the Government of Canada, such as the railways, airlines, post offices, and shipping companies that cross provincial and state borders. These employees are covered under the Canada Labour Code. As a new worker, you need to learn about these laws so that you know your rights and responsibilities in the workplace.

Employment Standards Act is the law that contains Ontario’s basic rules about the minimum standards for salary, overtime, vacations, maternity benefits, termination, and more. This provincial law covers most workers in Ontario. These laws set the standards for:

Minimum wage: Employers must pay both full-time and part-time workers at least the minimum wage. Any changes are announced in newspaper ads at least a month before the change happens.

Hours of work: This is the number of hours for each working day. The Act says that the limit for most employees is eight hours a day and 48 hours a week. Employers must pay employees overtime if they work more hours.

Overtime pay: Overtime pay is the wage that employers must give workers who work overtime. Overtime pay is the regular wage x 1.5, or time and a half.

Meal breaks: Workers must have a meal break each working day. The length of this meal break is determined either by the law, by the employer, or by union contracts. The Act does not set coffee and rest breaks, but some employers allow coffee and rest breaks throughout the day.

Public holidays: Under the law, Ontario has eight paid public holidays. Workers who qualify for paid public holidays don’t have to work on these days, but are still paid their regular wages for the day.
Vacation pay: Workers are entitled to a minimum number of days of paid holidays each year. The law determines how long workers must work before they are eligible for paid holidays and vacation pay.

Pregnancy and parental leave and benefits: This is the time off for a new parent. While on pregnancy leave, employees can receive employment insurance maternity benefits. While on parental leave, employees can receive employment insurance parental benefits. To qualify for these benefits, the employee must have paid EI over a period of time prior to the arrival of the baby.

Deductions: These are payments that employers can legally deduct from an employee’s paycheque. This includes Income Tax, Employment Insurance and Canada Pension Plan payments.

Termination of employment: The law determines how employees or employers end their contracts and how much termination pay must be paid.

Learning Activity #2: Vocabulary matching

Test your understanding of employment standards by matching the terms with their definitions on the next page.

1. ___ Minimum wage
2. ___ Hours of work
3. ___ Overtime pay
4. ___ Meal breaks
5. ___ Public holidays
6. ___ Vacation pay
7. ___ Deductions
8. ___ Termination of employment
a) Payments that employers deduct from an employee’s paycheque
b) The wage that employers must give workers who work more than the normal hours of work in a work week
c) Employers must pay at least this much to part-time and full-time employees
d) Firing or giving notice
e) Time off or the equivalent pay
f) The number of hours for each normal working day
g) Time available for breakfast, lunch, or dinner, depending on your work schedule
h) Days of rest, recreation, or festivity

Learning Activity #3: Interview

Work with a partner to fill in the chart with information about Ontario’s employment standards, and then ask your partner about workplace law in other countries. You may need to use the Internet to do this activity.

<table>
<thead>
<tr>
<th>Question</th>
<th>In Ontario</th>
<th>In ____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is the minimum wage?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. How many weeks of vacation do most workers get each year?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. How many public holidays are there?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. What are the normal working hours each week?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. What are the normal working hours each day?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Are employers required to pay overtime?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. What are some deductions from paycheques?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Is there maternity and parental leave? How long is it?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Learning Activity #4: Filling in a pay stub

Here is a pay stub for two weeks. Fill in the pay stub with this information:

1. This person worked for 75 hours.
2. The regularly scheduled hours were 72.5.
3. Commission on sales was $321.00.
4. The total pay before deductions was $1236.00.
5. Canada Pension Plan (CPP) contributions were $27.45.
6. Employment Insurance (EI) deductions were $18.30.
7. She received $45 in overtime pay.
8. Income Taxes deducted were $228.75.

<table>
<thead>
<tr>
<th>EARNINGS</th>
<th>DEDUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Overtime</td>
</tr>
<tr>
<td>72.5 hr</td>
<td>2.5 hr</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

What was the net pay? _________________________

Human Rights In The Workplace

Ontario Human Rights Code
The Ontario Human Rights Code is the law that says all citizens in Ontario must receive equal and just treatment. The Code protects workers in Ontario from discrimination and harassment by their employers or co-workers. It also reminds all workers to treat each other with respect.

The Ontario Human Rights Code forbids discrimination against a person because of race, colour, religion, or sex. Employers and workers must act according to the principles described in this law. For example, it is illegal to sexually harass people or to make jokes about people of different races.
Discrimination
Discrimination is being treated differently from other people. There are situations in which the employer is allowed to be selective on the basis of citizenship, age, or disability. But generally it is against the law to discriminate against people because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, age, record of offences, marital status, same-sex partnership status, family status, or handicap. This is why it is illegal for employers in Ontario to ask questions about an applicant’s marital status, number of children, age, etc.

Harassment
Harassment is a situation in which someone threatens or insults you. Racial harassment includes racial jokes and rude comments. Sexual harassment includes unwanted touching, sexual comments, sexual jokes, and suggestions. Discrimination and harassment can occur in job advertisements, questions about Canadian experience, job applications, job interviews, and in the way workers treat each other and how the employer treats the workers.

Ontario Human Rights Commission
The Ontario Human Rights Commission is the office that enforces the Ontario Human Rights Code. Anyone who has been discriminated against or harassed in the workplace should try to solve the problem with the colleagues and employer, but if this fails, the commission can help.
Learning Activity #5: Vocabulary matching

Match the terms with their definitions below.

1. ___ Ancestry
2. ___ Creed
3. ___ Family status
4. ___ Handicap
5. ___ Harassment
6. ___ Marital status
7. ___ Place of origin
8. ___ Sexual status
9. ___ Spouse
10. ___ Discrimination

a) Being in a parent and child relationship
b) Derogatory comments and unwelcome advances
c) Physical or mental disability
d) The person to whom you are married or with whom you live as a couple
e) Single, married, divorced, common law
f) Relatives from many generations back
g) Where you were born
h) Heterosexual (straight), homosexual (gay)
i) Being treated differently from others
j) Your beliefs, especially religious
Learning Activity #6: Discussion

Talk with a partner about questions that an employer might ask. What is a statement that you might see in a job ad that would be against the Human Rights Code?

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________
Learning Activity #7: Matching

Match each situation with one of the following types of discrimination or harassment:

P - place of origin    R - race    G - gender
C - creed    A - age    D – disability

__ 1. Andy answered an advertisement for a “Girl Friday”. The duties of the job involved typing, filing, and sorting. When he asked for an interview, he was told that the job was for “girls” only.

__ 2. Ameena applied for a job as a receptionist. Ameena is East Indian. She speaks English very well, but she has an accent. At the job interview, the employer told her that she was not right for the job. He said that the company needed someone who spoke English with no accent.

__ 3. Andrea speaks with a stutter. One of her co-workers makes fun of her when she stutters. He knows that this makes it harder for her to speak, but he does it anyway.

__ 4. Nathan works in a machine shop. He is black. Most of his co-workers are white. Last week his co-workers were telling “black jokes.” Nathan asked them to stop, but they just laughed at him and went on with the jokes.

__ 5. Ute has been looking for a job for almost two years. She can’t understand why it is so difficult. Her friends say that it will be impossible for her to get a job because she is 52 years old.

__ 6. Ahmed is a Muslim. He has a special prayer time every Friday and every Friday, one of his co-workers teases him, “There goes Ahmed to the mosque again!”

Adapted from: Discrimination and Harassment at Work, CLEO. August, 1993
Learning Activity #8: Discussion

Discuss the following situations and decide if the actions described are lawful (L) or unlawful (U) according to the laws described in this unit. Circle the appropriate letter.

L U 1. Anne applied to teach for a separate school and did not get an interview because she is not Catholic.

L U 2. Jonathan could not apply for a job as an airline steward because he uses a wheelchair to get around.

L U 3. Jose applied for a job and did well during the interview, but he did not get the job because a requirement for the job is Canadian citizenship.

L U 4. Marie was told that she could not apply for a job because she is over 65.
Health and Safety

Occupational Health and Safety Act
The Occupational Health and Safety Act helps to protect the health and safety of workers in the workplace. This Act is based on the idea that employers and employees must work together to create a safe and healthy workplace.

Employers must do everything possible to protect workers’ health and safety, and workers must work with employers to identify and solve safety problems in the workplace.

The Act gives workers four basic rights:
• the right to participate in keeping their workplace safe and healthy
• the right to know about health and safety hazards through the Workplace Hazardous Materials Information Management System (WHMIS)
• the right to refuse work that they think is unsafe
• the right to stop work.

Occupational health and safety applies to all workplaces; however, some workplaces will have more health and safety hazards than others. Contact the Health and Safety Association for your occupation or sector to find out more about the occupation where you are planning to work.
Learning Activity #9

Whose responsibility is it?

Circle E for employer and W for worker in front of each sentence, according to who is responsible. Remember that some responsibilities are shared.

E  W  1. Give information, training, and supervision
E  W  2. Not work or operate equipment in a way that could be dangerous
E  W  3. Make sure safe work procedures are followed and equipment is used properly
E  W  4. Report any broken equipment or safety devices
E  W  5. Keep safety equipment in good condition
E  W  6. Use the safety equipment available in the workplace
E  W  7. Report any health or safety violations
E  W  8. Provide training on how to handle hazardous materials

Workers’ Compensation

Workers’ Compensation Act
The Workplace Safety and Insurance Act states that workers who are injured at work or get sick from their work can receive compensation and assistance to get back to work. The Workplace Safety and Insurance Board (WSIB) is the office responsible for administering workers’ compensation. The WSIB also enforces the provincial occupational health and safety system.

No injury is too small to report!
All employees must be registered with the WSIB. Employers must register any new employees with the WSIB within ten days of hiring, or they can be fined. Employers must also report any injuries that occur at the workplace to the WSIB within three days of the injury. Workers must report any work-
caused injury to their employer immediately. If a worker misses work because of an injury or illness, the employer must report it to the WSIB within three days after the accident. Workers must also make a claim with the WSIB within six months of their injury. Although both the employer and the employee report any injury related to the job, employees must apply for workers’ compensation, and the WSIB decides if the law covers a worker or not.

Real stories…
WSIB Violations
An Ontario company operating as Ontario 1234567 has been charged with one count of failing to notify the WSIB within three days after learning of an accident to an employee. The company has also been charged with one count of failing to register with the WSIB within ten days of becoming an employer. These are violations under sections 152(3) and 151(1) respectively of the Workplace Safety and Insurance Act. The company and the company owner are scheduled to appear in a provincial courtroom.

Activity #10: Discussion

1. What law is this company breaking?

2. What were the responsibilities of the employer in this case?

3. What could the worker have done to prevent this?
4. What will happen next?

________________________________________

________________________________________

________________________________________

5. What do you think the judge will decide?

________________________________________

________________________________________

________________________________________

Learning Activity #11: Vocabulary review

Fill in the blanks using words from this unit.

1. The ___________________ __________________ is the law that talks about minimum wage, hours of work, etc.

2. If an employer discriminates against me, I can complain to the ___________________ __________________.

3. An example of ______________________________ is when an employer doesn’t hire someone because of their skin colour.

4. An example of ______________________________ is when someone threatens or insults me at work.

5. If I get injured at work I can get ____________________.

6. _______________________________________ is my pay before all the deductions.

7. The ___________________ __________________ says that I have the right to know if I am working with hazardous materials.
Learning Activity #12: Quiz

How much do you already know about workplace law in Ontario? Work individually or in groups to select the right answers to the following questions about Ontario’s employment standards. You may need to use the Internet to do this activity.

1. At this time, September 2005, what is the minimum wage in Ontario?
   a. $5.60
   b. $7.52
   c. $7.45

2. How many weeks of vacation do most workers in Ontario have every year?
   a. Four
   b. Three
   c. Two

3. How many public holidays are there in Ontario?
   a. Eight
   b. Twelve
   c. Nine

4. What are the normal working hours for a worker in Ontario each day?
   a. Nine
   b. Eight
   c. Seven

5. What is considered overtime?
   a. Always after an employee has worked 48 hours in a work week
   b. Usually after an employee has worked 60 hours in a work week
   c. Usually after an employee has worked 40 hours in a work week
6. What deductions can employers take from an employee’s pay cheque?

   a. Income tax, CPP, EI
   b. Income tax, CPP, EI, uniforms, food
   c. None

7. Can employers legally fire you if you complain about a safety problem at work?

   a. No
   b. Yes

8. Liquor servers make...

   a. More than the minimum wage
   b. The minimum wage
   c. Less than the minimum wage

Rules and Regulations
The Ministry of Consumer and Commercial Relations (MCCR) is the part of the Ontario government that protects consumers. It works with a number of regulatory bodies to make sure that consumers in Ontario are treated fairly.

Retail Business Holiday Act: This act forbids business being done on eight days in the year: New Year’s Day, Good Friday, Easter Monday, Victoria Day, Canada Day, Labour Day, Thanksgiving Day, and Christmas Day. Since 1996, businesses have not been required to close on Boxing Day. Municipalities can pass bylaws that further limit hours of operation.

The Real Estate and Business Brokers Act: The Real Estate Council of Ontario (RECO) administers this act and its regulations for MCCR.

The Motor Vehicle Dealers Act: The Ontario Motor Vehicle Industry Council (OMVIC) administers the act and regulations for MCCR.

Retail Sales Tax Act: This act regulates the collection of provincial sales tax.
Learning Activity #13: Research

Go to the website of the Ministry of Consumer and Business Services at www.ccr.gov.on.ca/mccr/english/welcome.htm. Go to Related Sites. Find one that is related to the occupation you are interested in. Report what the site contains to the rest of the class.

For more information on…

If you need more details on Ontario’s employment standards, use brochures or the Internet to find information about employment standards in Ontario.

Contact the Ministry of Labour at 416-326-7000 or toll-free at 1-800-531-5551.

Visit the Ministry of Labour website at www.gov.on.ca/LAB.

Contact the federal government’s Employment Information (EI) line at 1-800-622-6232 or visit the website at: www.hrdc-drhc.gc.ca and follow the links to employment insurance.

Contact the WSIB at 416-344-1013 or toll-free at 1-800-387-8638, or visit the WSIB website at www.wsib.on.ca.

Search the Internet for the health and safety association for your area. Request a copy of WHMIS from Occupational Health and Safety at 416-314-5421 or www.gov.on.ca/lab/ohs.

Contact a legal clinic in your area. Legal clinics give free legal help to workers who are not represented by a union. For more information, contact CLEO (Community Legal Education Ontario) at 416-408-4420.
Wrapping It Up!

In this unit, you will begin to make a personal plan. Where do you go from here? What are the next steps that you need to take? Before you begin your job search, it is important to assess and evaluate your skills, training, and objectives. This will help you decide if you are ready for the workplace.

Self-assessment

A self-assessment allows you to:

1. Consider your personal characteristics
2. List your training, experience, and industry skills
3. Know what you want in a job
4. Make a list of the first steps

Personal Plan

Now that you have nearly completed this course, you have shown you have the essential skills needed to work in retail. Talk to your instructor about the Supported Job Search Program. It will give you the support you need to effectively look for work.

One way to make sure that you get where you want to go is to map out your journey by deciding on a few steps at a time. This is sometimes referred to as “setting realistic goals” or “setting attainable goals.” The list of questions on the next pages is based on the skills, knowledge, and training employers are looking for in retail associates. The questions will help you think about your previous education, training, experience, skills, knowledge, and interests and help you make a plan of action.
Learning Activity #1

1. Assess your personal characteristics. Answer the questions below with a yes or no. These personal characteristics are seen as essential for successful sales professionals. Where the answer is no, think about what you could do to change it to a yes. Are there courses you could take? If you need more information, can you do research?

<table>
<thead>
<tr>
<th>Questions</th>
<th>Yes</th>
<th>No</th>
<th>To change my answer to yes, I can …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have a good attitude and a positive outlook on life?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you enjoy competition?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Are you familiar with the dress codes used in retail positions?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you organized?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you get things done on time?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you take advice from others?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you adapt easily to changing conditions?</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Communication and Social Skills

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can you communicate clearly and effectively in English both orally and in writing?</td>
<td></td>
</tr>
<tr>
<td>Are you confident in your customer service skills?</td>
<td></td>
</tr>
<tr>
<td>Do you enjoy working with the public?</td>
<td></td>
</tr>
<tr>
<td>Are you able to work well in a team setting?</td>
<td></td>
</tr>
<tr>
<td>Do you know about workplace laws?</td>
<td></td>
</tr>
<tr>
<td>Can you problem-solve in a variety of situations?</td>
<td></td>
</tr>
<tr>
<td>Do you work well with supervision and independently?</td>
<td></td>
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<tr>
<td>Do you enjoy selling?</td>
<td></td>
</tr>
</tbody>
</table>

2. The following questions focus on your skills and training. First, go through all the questions and answer yes or no. Then, go back and look at all the questions where you answered no. Try to think about what you can do to gain this knowledge or these skills. Are there courses that you can take to help? Are there people at the learning centre you are attending who can help you? Are there ideas that you need to reconsider?
<table>
<thead>
<tr>
<th>Questions</th>
<th>Yes</th>
<th>No</th>
<th>To change my answer to yes, I can …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can you use a word processor?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you able to use the Internet to do research on competitors, send email messages, and research products?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you use a cell phone or pager?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you use a cash register?</td>
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</tbody>
</table>

**Education And Training**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Yes</th>
<th>No</th>
<th>To change my answer to yes, I can …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have the education level that you need to be successful in sales?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you think you need upgrading or extra training before your job search?</td>
<td></td>
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<td></td>
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</tbody>
</table>
3. Make a short-term plan with one of the questions you answered “no” to. Choose five steps you feel you can realistically accomplish this year and record them below.

Step One:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Step Two:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Step Three:
___________________________________________________________________________
___________________________________________________________________________

Step Four:
___________________________________________________________________________
___________________________________________________________________________

Step Five:
___________________________________________________________________________
___________________________________________________________________________
Training and Upgrading

Retail associates are lifelong learners. They always have to learn new product lines, discounts, specials, new inventory systems, new marketing plans, and other on-the-job training. Employers also send staff on short and long-term training. When you are not employed, your learning is independent learning.

Training and upgrading is available from community-based learning centres, local boards of education, community colleges, private training institutions, and universities. There are full-time, part-time, co-op programs, and continuing education programs.

Industry Knowledge

Sales professionals need to stay current on product development, future trends, and the economy. Retail sales associates need to know whether the economy is healthy or not. It would also be useful for them to keep up with buying trends and tax information. Reading the business section of the newspaper, watching or listening to TV and radio business reports are free to all. There are several Internet sites that track trends in the marketplace or give tips on customer service skills and how to increase your sales!

Computer Literacy

Retail associates use a variety of computer-related tools at work, such as computerized cash systems and bar code scanners. Basic computer literacy, such as the ability to use the Internet and email are now business essentials. Both public and private education centres offer computer courses.

Volunteering

Consider giving your time through volunteering to build your skills. Today, there are over 175,000 charities and non-profit organizations in Canada, with over 7.5 million volunteers. They are part of the reason Canada was named the country with the highest quality of life in the world a number of times.
There are many different tasks you can do as a volunteer. You can be a board member of a non-profit organization, organize events, or provide telephone services. “Virtual volunteering” allows a person to perform volunteer work from a distance, using email, the web, telephone, or fax. For example, you could send out letters using a database on your home computer or make phone calls for an organization to let members know about an upcoming event. Volunteering is a great way to explore a new career path. It can give you a first-hand look at what it is like to work in a particular industry.

In a recent survey, one third of all volunteers believed that volunteering had given them new skills that could be applied directly to the workplace. Nearly two thirds of volunteers felt that their efforts would increase their chances of finding a job.

Matching Sales to Volunteering:

There are a number of campaigns every year that are directly related to selling and marketing, face-to-face or telephone sales. A few examples are listed below:

- Daffodil Campaign

- White Ribbon, Red Ribbon, Pink Ribbon

Find a cause that interests you and sell!

Source: Canada Prospects 2000/2001
Networking

Your network includes everyone in your life. Your network is probably much bigger than you think! People in your network can help you, and you can help them. You should learn what you can about each individual and acknowledge his or her skills, experiences, talents, and needs. The people you know are “warm” leads. It's much easier to build on that warmth by expanding your knowledge of these people, than it is to pursue “cold” leads. Give them an opportunity to learn more about you. Look at the chart below and think of how you could network with them.

| **Family:** | Members of your family are individuals with skills and backgrounds. You can tap into their knowledge and their networks. |
| **Friends:** | Your friends have skills you may not be aware of, and they have their own networks. Ask to be introduced. |
| **Neighbours:** | Because you live close by, you have a chance to develop close relationships. Find out who your neighbours are. |
| **Clubs or Associations:** | If you are involved with any community associations or activities, you have a ready-made network. Most people join these groups to meet others. The door is already open. |
| **Volunteer Groups:** | One of the reasons people volunteer is to meet others. A lot of networking can occur through volunteering. |
| **Acquaintances:** | These are people who you meet in work and social settings. Don’t waste the opportunity to begin friendships and networks this way. Ask each person you meet to tell you more about her or himself. |
The following are some descriptions of the knowledge or experience that you want to find in someone when you begin networking:

**Find Someone Who…**

- Has experience in retail as an associate or in a supervisory position
- Has training in customer service
- Is skilled in computer technology

**Learning Activity #2**

Remember to write in complete sentences and check for correct spelling and grammar!

1. Everyone you know is part of your network. Name three people in your life, and describe how they can help you make future job connections.
2. What is the difference between a “warm” lead and a “cold” lead? Provide an example for each.