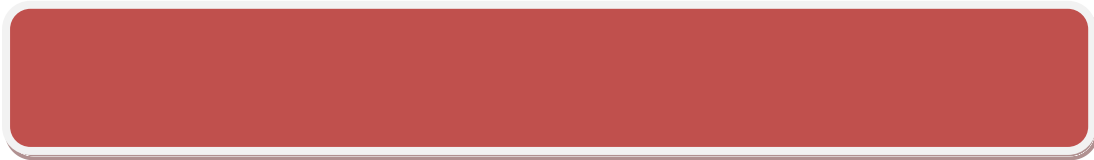


# RETAIL



**STUDENT HANDBOOK**

*CLASS X*

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- Unit 1 : Delivery of Goods
- Unit 2: Retail store operation
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- Unit 4: Security Operation and housekeeping in Retail



# Unit-1: Delivery of goods

Unit Code: RS204- NQ2012	Unit Title: Billing, Transport and Delivery			
Location: Classroom, Retail shop store operations	Duration: 15 hours			
	Session-1: Billing Procedures			
	Learning Outcome	Knowledge Evaluation	Performance Evaluation	Teaching and Training Method
	1. Describes the Basic Understanding & Competencies for Billing Personnel	1. State various types of Billing and Accounting Heads 2. Understanding basic accounting Terminologies related with Billing & Accounting Procedures. Example: Service Tax, Sales Tax, VAT, Other Duties etc.	1. Calculate the Routine Accounting and Billing Transactions 2. Explain the various taxes and duties related with Billing to Customer	<b>Interactive lecture:</b> Understanding Basic Accounting and Billing Procedures. <b>Activity:</b> Role Plays and Activities based on Billing and Accounting Procedures.
	2. Handle the various Modes of Payments during Billing Process	1. Describe various Modes of Payment. 2. State the precaution to be taken while handling the modes of Payments 3. Understanding uses of Various Equipments used in Payment Process	1. Differentiate between various modes of Payments 2. Collect and Operate various Payment Modes 3. Operational Knowledge of Various Equipments in Payment Process	<b>Interactive Lecture:</b> Based on Modes of Payment <b>Activity:</b> On-the-job to handle payments in retail organization.
	Session 2: Elements of Transportation			
	1. Describe the various modes of transportation	1. Common modes of retail transportation 2. Factors affecting modes of transportation	1. Differentiate between various modes of transportation 2. Identify the factors determining combination of mode of transportation	<b>Interactive lecture:</b> Modes of transportation and their cost benefit analysis <b>Activity:</b> Make a small report on cost effective modes of retail transportation
	2. Identify objectives	1. Describe the	1. Enlist various	<b>Interactive lecture:</b>

	of loading and unloading	objectives of loading & unloading 2. Discuss the significance of loading & unloading	objectives of loading & unloading 2. Practice each and every objective	Functions and objectives of loading & unloading <b>Activity:</b> Discuss with your instructor the significance of loading & unloading and make a brief report
	3. Identify the problems associated with retail transport	1. Types of problems faced during transportation in retail 2. Solutions to overcome problems in retail transportation	1. Analyze the various issues with retail transportation 2. Suggest solutions overcome for problems in retail transport	<b>Interactive lecture:</b> Problems in retail transport <b>Activity:</b> Hold a group discussion to find solutions to the problems of retail transportation
	<b>Session 3: Delivery Procedures</b>			
	1. Understand the various Delivery Procedures for delivery of items	1. Describe various Delivery Procedures for delivery of Goods used in Malls, Grocery Shops and Web Based Service	1. Differentiate between Various Delivery Procedures	<b>Interactive Lecture:</b> Delivery procedure in retail stores <b>Activity:</b> Delivery process of Departmental Stores & Malls
	2. State the Delivery Process of Departmental Store/Malls	1. Identify the methods for packing, bagging and arranging for delivery in departmental stores & malls	1. Demonstrate Procedures of Packing, Labeling, Marking and arranging for delivery in departmental stores and malls	<b>Interactive Lecture:</b> Delivery procedure in retail stores <b>Activity:</b> Delivery process of Departmental Stores & Malls
	3. Identify the Delivery Process of Grocery/Small Shops	1. State the methods for packing Labeling, Marking and arranging for delivery 2. Process of Home Delivery	1. Demonstrate Procedures of Packing, Labeling, Marking and arranging for delivery of grocery/small shops 2. Demonstrate the process of Home Delivery	<b>Interactive Lecture:</b> Delivery process of grocery/small shops <b>Activity:</b> Role Play on Customer Handling, Packing, bagging and Delivery of goods.
	<b>Session 4: Laws in Record Maintenance</b>			
	1. Identify the various records &	1. State the various Records &	1. Demonstrate the posting entries in	<b>Interactive Lecture:</b> Maintenance of



	maintenance followed in Retail	Maintenance used in organized Retail Sector	Registers. 2. Identify the methods of maintenance in organized retail.	Records in Organised Retail <b>Activity:</b> Visit to retails organization and observe the recording maintenance system.
	2. Understand the laws of various record & maintenance	1. Laws for Record & maintenance methods used in small shops/ Grocery Shops/ Small Scale Industry	1. State the posting entries in Registers by small shops/Grocery Shops/Small Scale Industry 2. Find out the laws of maintenance in small shops/grocery shops/small scale industries	<b>Interactive Lecture:</b> Laws for maintenance of record in small shops/grocery shops/small scale industry. <b>Activity:</b> Visit to small shops/grocery shops/small scale industry observe the laws followed in recording maintenance system.

## Introduction

Marketing is regarded as crucial element for the success of any enterprise. Over the last decade, the retail marketing in India has grown significantly. We have witnessed the launch of a large number of retailers entering into retail industry.

Retail is the final stage of any economic activity. By virtue of this fact, retail occupies an important place in the world economy. Retailing refers to all activities involved in selling goods or services to the final consumers for personal, non business use. A retailer or retail store is any business enterprise whose sales volume comes primarily from retailing. Put simply, any firm that sells products to the final consumer is performing the function of retailing.

Retail market refers to place where a group of consumers with similar needs and a group of retailers meet using a similar retail format to satisfy those consumer needs.

The supply chain distribution logistics encompasses all activities and exchanges involved in extracting, processing, manufacturing and distributing goods and services from raw material through to the end consumer. It requires retailers to take a complete view of these activities and adopt innovative approaches to meet customer's needs with

great efficiency. Keeping in view the importance of logistics the billing, transport and delivery aspects are very much required for running the retail business. In this module we covered the retail aspects like billing procedure in retailing, elements of transportation and delivery system in retail business.

## **Session 1: Billing Procedures**

### **Relevant Knowledge**

The maximum number of customer interaction that one faces in a retail store is the cash counter. Hence it becomes very important to keep the cash counter very efficient and manned at all times. An effective and neat cash counter is a sign of a very professionally managed store.

It's the responsibility of the cash counter in-charge or the head cashier to see to it that each and every cash counter is managed properly. At start of the trading it's important that the cashier assigned to a specific cash counter needs to look into the following points:

- ✦ The cash counter is neat and tidy
- ✦ To ensure the cash till/POS machine is working
- ✦ To check all telephone lines and EDC machines are working
- ✦ To ensure stationery is available
- ✦ To ensure returns are sent back

Cashiers should ensure that Q-managers are in place in front of the cash counter to avoid crowding of customers in front of the cash desk.

The head cashier should ensure this is practiced religiously every day.

Usually a head cashier is expected to generate a report which shows the total number of transactions done in all the cash counters, a detail SKU wise report, a detail tender wise report and a detail report in all individual cash counters which will reflect all the cancellations done, refunds made, and any other specific transaction made apart from the billings made. Based on these reports the head cashier has to submit his daily submission report to the store manager. Also all investigations are done based on these reports. Some software also has the efficiency to generate report period wise, apart from date wise, and also time wise, i.e. between a specific time periods in a day, individually in all cash counters. The more the reports are detailed the easier it becomes for a head cashier to investigate a case.



This highly loaded POS is capable of integrating with all types of POS accessories.

Users reduce the waiting time of their customers at billing counters. They also prevent shrinkage loss at the front end of the store by eliminating chances for malpractices & mistakes. The Key Features retail billing is as under:

- ★ Provisions to capture additional information in invoice helps better tracking in cases of home delivery
- ★ Easy to use Product search interface helps in quick & efficient product search based on different parameters like product code, name, product alias & barcode
- ★ Supports EAN, UPC, GTIN, QR and custom designed bar code scan
- ★ Hold bill is great feature to hold a particular bill & resume it after some time
- ★ Facility to maintain scanned copies of important documents in the software for parcel entry tracking
- ★ Supports Exchange feature which allows setting of multiple exchange prices for the same product
- ★ Supports Exchange scheme in billing. Multiple exchange price can be defined for the same product based on condition
- ★ Supports retail & tax invoice
- ★ Quotation/Proforma/Sales Order/DN to Sales Bill conversion
- ★ Fix price of the product depending on purchase price or as per demand. This results in fixing optimum selling price if same product is purchased at different rates
- ★ Swipe card readers interface to reduce credit/debit card tender time
- ★ Supports all types of payment modes like Cash, Card, Coupon, Gift voucher, mixed payment tender type such as part cash, part credit card, etc
- ★ Auto recovery & Offline billing possible if connection with server is disturbed
- ★ Supports Till Management which facilitates recording of all sales, purchase details & cashing up
- ★ Supports exchange dues
- ★ Due bill payment feature allows processing of unsettled bills
- ★ Facility to maintain manufacturer, supplier & your own product code



## Solution Highlights

### ***Easy, Fast & Robust Billing***

Enhance billing through the integration of barcode scanners and weighing scale to the POS. The cashier just needs to scan the products & print the bill. In some cases, they can even hold a bill and recall the same thereby serving the long queue of customers faster.

### ***Re-order based on Sales/Stock***

Our comprehensive re-order features help you plan replenishment wisely based on previous PO, purchased quantity and item sold quantity for a particular period. You can also generate supplier-wise PO by analyzing last 'N' day, weekly, monthly & yearly sales details.

### ***Purchase Formula & Price Level***

Simplify purchase entry for each one of your supplier using our PURCHASE FORMULA with discounts, taxes, freight, etc. It takes one time configuration that helps you to do inward process entry easily without any mistakes & effortlessly.



### ***Effective Day-end Process***

You need to have control over the billing counter staff to prevent pilferage. Achieve this by using snapshot, session management, till management & cash hand over features in your POS. In-fact, day-end report will reflect counter-wise excess or shortage of cash accurately.



### ***Repacking, Split & Kit items***

Inventory of grocery items which are purchased in bulk quantity and later repacked in small quantities are manageable. Items can also be bundled as a KIT item like gift pack.



### ***Home Delivery & Due Bill***

Orders which need to be delivered at the doorstep can be billed as Due bill. Type of payment by customer can be captured later with delivery status.



### ***Credit Card & Coupon Tracking***

Entire cycle of debit or credit card and coupon transactions are trackable in detail. Apart from that, you can also trace coupons collection, deposit and reimbursement details.







### ***Swipe Card Reader Interface***

By integrating swipe card readers, the job of cashier becomes much more easy. Card payments get captured directly without manual entry and ensures accuracy.



### ***Check Actual & Analyze Status on the go to Support Decision Making***

Go-Frugal's report tool is very flexible, easy to use, fully customizable. It provides MIS reports that help decision making, analyzing the trends & competition. This helps you to know the current status of the stores, keeping track of various transactions, etc. This reporting tool includes more than 350 pre-defined reports & designed to take care of all reporting needs of any business. Go-Frugal's Webreporter, an add on product gives you the ability to see reports on the Internet via browser from remote locations. The Key Features of this Webreporter is as follows:

- ✦ Report personalization allows you to configure the reports i.e. grouping fields in a report, customizing columns display order, related reports can be grouped/mapped & report filters can be customized.
- ✦ Reports can be added to "Myreport" for frequently viewed reports.
- ✦ All reports can be exported to Excel, HTML, PDF & mail formats.
- ✦ Comprehensive stock, sales & purchase analysis based on product, distributor, manufacturer, category & returned transaction.
- ✦ Supports generation of Inventory Analysis reports such as age analysis, product margin, category-wise stock & excess stock.
- ✦ Master data analysis like newly created customers list for a given period.
- ✦ Salesman commission analysis based on total value of sales, sales return, commission slab based or product age based.
- ✦ Generates list of Top N customer for month, non-regular customers, fast & slow moving products, dead stocks/non-billed products, inventory transaction, etc.
- ✦ Supports report scheduler & report security (reports can be configured by each user).
- ✦ Supports Day end report for filtering the records on a given date for given bill types & choose the bill to edit (in Bill Entry Screen).
- ✦ Generates other reports like Sales & Purchase tax, Price level, Price drop, repack, current stock, stock re-ordered, stock ledger, stock movement, etc.
- ✦ Users can create customized report templates by defining & selecting fields.

## ***Telecom Retail Billing***

When we talk about telecom billing then by default it is about retail billing. As defined earlier telecom retail billing is defined as follows:

Telecom Billing is a process of collecting usage, aggregating it, applying required usage and rental charges and finally generating invoices for the customers.

Telecom billing process also includes receiving and recording payments from the customers.

Retail billing deals directly with the end customer and comes with lot of challenges to meet end customer expectations and regulatory obligations. A billing is assumed to be successful as long as it is fulfilling following criteria:

- ★ **Timely Billing:** End customer's invoice is being generating on time i.e. nominal date. There may be some circumstances when end customer does not get their invoices on time because of some logistic issues. But it is IT's responsibility to generate all the due bills on due date.
- ★ **Billing Accuracy:** This is most important factor for the customer satisfaction and from regulatory obligation point of view. If billing system is not generating accurate bills then it can lead to serious business issue from legality point of view as well as leaving a customer in unhappy state.

## ***Retail Vs Wholesale Billing***

Retail billing deals with end customer and billing an individual customer where as wholesale billing dealing with billing to the following entities depending on situation and nature of business:

- ★ Billing resellers associated with a telecom operator.
- ★ Billing interconnects partners for providing interconnection to make calls to other operators' customers.
- ★ Billing roaming partners for providing services to their customers when they roamed in an operator's coverage area.

Wholesale billing is easy in comparison of retail billing and allows a big level of threshold of tolerance where as retail billing always needs to be 100% accurate. Wholesale billing can never if 100% accurate because of various reasons like difference in prices configured in two operators systems or difference in number of calls rated because some of the calls may got missed at any network element.



There are specialized billing systems which are being used to handle retail billing like Convergys and Amdocs Billing systems are famous for retail billing where as ASCADE and INTEC billing systems are famous for wholesale billing.

Wholesale billing can also be settled using retail billing systems by using simple reports because they do not deal with too many discounts and promotion types where as retail billing needs all these complications and can not be handled using wholesale billing systems.

All the concepts discussed so far in this tutorial was related to retail billing and subsequent chapters will discuss about interconnect billing, roaming billing and other billing types.

## EXERCISE

Visit two malls or stores of your nearest area observe the billing procedure and write your report comparing of two stores for billing procedure and summarize with suggestions to improve billing in the store.

Note: For this assignment you can gather to 10-20 customers of each store, suggestions on billing procedure of each store.

### A. Fill in the Blanks

1. It's the responsibility of \_\_\_\_\_ to see that every cash counter is managed properly. (cash counter in-charge/head cashier).
2. \_\_\_\_\_ features which allows setting of multiple exchange prices for the same product. (support exchange).
3. Auto recovery and \_\_\_\_\_ is possible is connection with server is distributed. (offline billing)
4. Telecom billing process includes \_\_\_\_\_ and \_\_\_\_\_ payments from the customers. (receiving, recording)
5. Wholesale billing can also be settled using \_\_\_\_\_ (retail billing system)

### B. Multiple Choice Questions

1. Placed cashier is expected to generate report which shows that –
  - (a) Total number of transaction done
  - (b) Detail SKU wise report

- (c) Detail tender wise report
  - (d) All the above
2. Billing accuracy s most important factor for –
- (a) Customer satisfaction
  - (b) Reseller satisfaction
  - (c) Purchase satisfaction
  - (d) None of the above

## CHECKLIST FOR ASSESSMENT ACTIVITY

### Part A

- ✦ Describe billing procedures.
- ✦ Responsibilities of billing in-charge.

### Part B

- ✦ What is the billing procedure?
- ✦ What are the responsibilities of billing in-charge?
- ✦ What are the key factories of retail billing?
- ✦ Effective billing solutions.
- ✦ Wholesale and telecom billing.

### Part C

#### **Performance Standards**

The performance standard covered by the assessment includes the following, but not limited to:

Performance Standards	Yes	No
Able to identify billing procedure in retail.		
Able to identify key features of retail billing.		
Able to identify responsibility of billing in-charge.		



## Session 2: Elements of Transportation

### Relevant Knowledge

In general the modes of transportation in marketing management are (1) Road (2) Water (3) Air. These modes or a combination of it is used to transfer raw material to working spot or factory, finished goods to whole seller, further to retailer and lastly to consumer. In this module let us discuss about transportation of goods from retailer up to handing over to consumer.

### Modes of Retail Transportation

As said in the above paragraph that transportation can be done in any of the three modes - road, water, air. But in retail marketing there are two important types - store and non-store retailing. In non-store retailing and in e - retailing in most of the cases all three modes may be adopted. Here postal department services or courier services are adopted. Both postal department and courier services use various methods/use various modes with main objectives to deliver goods at a shortest time and low cost. Normally a combination of different modes of services is adopted to obtain best result. This combination is usually decided by origin and destination points.

Some of the points which decide about modes are:

- ★ Distance between two points is small: if distance is small and well connected by road, then, normally water and air modes are not considered.
- ★ Distance between two points is too high and weight of the goods is small: A combination of road and air can be used.
- ★ Distance between two points is too high and weight of the goods is high: A combination of road and water (ship) can be used.
- ★ A combination of water and road is used when road connection is not good and boat is a mode of transportation.
- ★ A combination of road and train is used depending upon facility available for the same.

In case of store retailing normally different modes of road transportation is adopted depending upon the situation. Here delivery of the goods is of two types (1) delivery of the goods from store to customer example: hardware materials, tails etc. or (2) from showroom to customer example: normal grocery items in kirana store. In the above two, method adopted depends on easiness of loading and unloading process.

In general retail transport can be treated as movement of goods from store or showroom of retailer to handing over it to the consumer.

### Objectives of Retail Transport

- ✦ To deliver the goods to the customer in a short time.
- ✦ To deliver the goods at a lease cost.
- ✦ To reduce loading and unloading as much as possible.
- ✦ To improve safety measures during transporting.
- ✦ To adopt all legal requirement towards transportation.

### Loading and Unloading of Merchandise

Loading and unloading of the goods is a very important activity in retail management. This activity is associated with cost, time, wastage, handling of material, safety of employees and others.

Factor Affected by loading and unloading:

- ✦ Cost
- ✦ Time of delivery
- ✦ Wastage of material
- ✦ Safety of employees
- ✦ Government rules

### Objectives of Loading and Unloading

When the finished goods is received from factory or wholesale dealer the retailer must receive these goods in his store/showroom. For doing this job he has to unload the material from the transport device. In the same way when the customer purchases the material from the retailer, he has to load the purchased material into the transportation vehicle. These activities are called as loading and unloading of the materials. There are various good practices of loading and unloading, some of them are:

1. When a bulk order is obtained, send the delivery of the material directly from factory/whole sale dealer to customer.
2. Load the materials for delivery to the customer, as early as possible which helps in reduction in stock storage space, early realization of selling price, avoiding obsolesce and minimization of safety cost.



3. Protect the material from fire, rain water, theft etc.
4. Delicate materials must be handled carefully.
5. While handling hazardous material extra safety measures must be taken while loading and unloading.
6. While loading and unloading government rules must be followed towards safety.
7. Some materials cannot be stores for longer duration and it has to be handled with care. Example: vegetable etc.

### **Problems associated with Retail Transport**

1. Maintaining supply chain efficiency in face of increasing risk and unpredictability.
2. Infrastructure congestion exacerbated by unforeseen or uncontrollable events.
  - (a) Natural disasters
  - (b) Labour strike and shortages
  - (c) Terrorism
3. Heightened supply chain security.
4. Increasing costs
  - (a) Inventory just-in-time to just-in-case.
  - (b) Congestion e.g. demurrage, fuel, traffic, mitigation fees, container fees.
  - (c) Security.
5. Using retail transport for cross border is very complex, time consuming and costly, for example, retail companies needs at least 12 different permissions issued by different authorities.
6. For import and export of goods needed customer clearances before sending to distribution centers.
7. It is needed to translate all information into national or regional language trigger additional handling and logical efforts regarding the separation and specific treatment of merchandise for different countries. Merchandise has to be logistically separated and relabeled to continue to final destination.

### **EXERCISE**

1. Visit a retail outlet or a mall located in your area, interact with the owner and employees and ask the following questions and write their replies in not more than 50 words.

2. Visit a Retail organization, nearby your area, interact with the owner and employees and ask the following questions and write their replies in not more than 50 words.

**A. Questions to Employee/owner**

1. What are the modes of retail transportation?
2. Is there is any analysis done to improve retail transportation in terms of cost, time, quality of delivery etc.?
3. Are you using door delivery system as one of the method to attract customer?
4. What are the problems faced by you in loading and unloading of a product?
5. What action taken to solve above problems?

**B. Question to Employees**

1. What are the innovative methods suggested by them in handling the products?

**A. Fill in the Blanks**

1. Distance between two points is too high and weight of the goods is small then a Combination of \_\_\_\_\_ and \_\_\_\_\_ can be used in retail transportation.
2. Distance between two points is too small and weight of the goods is small then \_\_\_\_ can be used in retail transportation.
3. If the distance is high and weight of goods is also high, then \_\_\_\_\_ and \_\_\_\_\_ can be used for retail transportation.
4. While loading and unloading extra care must be taken for material.
5. For perishable items loading and unloading is an important factor.

**B. Multiple Choice Questions**

Tick the correct answer

1. Most important mode of retail transportation is -
  - a) Rail
  - b) Air
  - c) Road
  - d) Water





2. Objective of retail transportation is -
  - a) improve quality of goods
  - b) reduce production wastage
  - c) increase in sales
  - d) timely delivery to customer
3. This is not one of the mode of retail transportation -
  - a) e-mail
  - b) road
  - c) air
  - d) water
4. Loading and unloading must be -
  - a) reduced
  - b) increased
  - c) maintained
  - d) none of above
5. Hazardous material must be loaded and unloaded
  - a) quickly
  - b) carefully
  - c) do not handle
  - d) both a and c

## **CHECKLIST FOR ASSESSMENT ACTIVITY**

### **Part A**

Use the following checklist to see if you have met all the requirements for Assessment Activity.

1. Various methods of store and non-store retail transport.
2. E-commerce retail transporting.
3. Objectives of retail transporting.
4. Definition of retail transportation.
5. Identify the factors affecting loading and unloading.

6. Determine objectives of loading and unloading.
7. Differentiate the various methods of loading and unloading.

### Part B

Discuss the following in Class Room:

1. Define retail transportation.
2. What are the modes of transportation in e-commerce?
3. Explain all types of transportation.
4. What are the objectives of retail transportation?
5. What is Retail loading and unloading?
6. What factors influence Retail loading and unloading?
7. What are the objectives of Retail loading and unloading?

### Part C

#### Performance Standards

The performance standard covered by the assessment includes the following, but not limited to:

Performance Standards	Yes	No
Able to identify the difference between various types of transportation.		
Able to understand the objectives of the retail.		
Able to learn e-commerce transportation.		
Able to differentiate the various methods of loading and unloading.		

## Session 3: Delivery Procedures

### Relevant Knowledge

#### Retail Delivery Process

Fitting out a major retail scheme owes a lot to effective retail delivery management. We know retailers value flexibility. The ability to delay decision-making until the last minute is very important – enabling the latest trends to be incorporated into a store's design, or units to be let at short notice.

Retail developments, by contrast, rely on tight control and effective management to achieve trading dates. The retail delivery manager provides a single point of contact



that balances the needs of retailers with the discipline required to meet the opening date. We know this can't be undertaken as part of another role. We use a dedicated resource to ensure that and we understand what the stakeholders need before they come on board.

Bringing together the centre management, existing tenants, new tenants and the construction team, we align all the stakeholders by communicating the design vision, practical constraints and risks face to face.

We make sure that agreements for lease, contract documents and warranties all contain the necessary safeguards and deliverables for a successful fit-out on site, driving out problems that may otherwise only become apparent the day a tenant arrives on site.

Once on site, we manage the process and interface between stakeholders. Everyone is kept on the same page and aligned with the commercial goals of the project.

We have used our insight and experience to develop a dedicated method. This framework provides a clear view of the process from inception to close out, so that each member of the project team knows what they are doing and when. In turn, this allows our clients to concentrate on structuring deals in the knowledge that everything will dovetail together on site.

The Retail Delivery is the management process designed to help guide our tenants from the design stages through to the successful opening and trading of a store within a Westfield centre. Fitting out so many stores at once can put tremendous pressure on supply chains and specialized resources as there are a huge number of developments completing during the same timeframe. Plan ahead and don't be afraid to ask one of the Retail Delivery team for assistance if you need to. The main stages in the Retail Delivery process are set out below:

## **1. Tenant's Briefing**

- ★ The Retail Design Manager (RDM) introduces the vision for Westfield Stratford City and presents the Design Guidelines to your design team. The RDM outlines the design approvals process and all design-related queries can be tables at this meeting.
- ★ Westfield's Retail Project Manager (RPM) will answer your queries on any technical aspects of the project, discuss a programme of works and outline the process ahead. During (or shortly after) the Retailer Briefing Meeting, you will be issued with a Detailed Tenancy Pack which will contain all the information required for you to start designing your store.

## 2. Design Approval

- ✦ The Tenant will submit the concept design to the RDM at this stage. The RDM will review the concept design and issue comments and approval.
- ✦ The Tenant will submit a more detailed concept design to the RDM. The RDM will review the concept design and issue comments and approval.

## 3. Fit-out

- ✦ At this stage, the Tenant appoints its Fit-Out Contractor and the premises is inspected by the Tenant for access. Westfield conducts the Pre-start
- ✦ Induction and the Tenant submits pre-start information to the RPM and H&S for review.
- ✦ The RPM and RDM issue comments. Access to the premises is granted and the Tenant's fit-out work commences. The RPM and RDM monitor the fit-out.
- ✦ This includes the Tenant's Commissioning, Consent to Trade, Merchandising and Store Opening. Necessary steps are: tenant commissioning and landlord interface; tenant completed snagging; tenant issuance of H&S file (O&Ms), as-built drawings and statutory certificates to RPM; RPM Consent to Trade issued.

## 4. Completion Stage

- ✦ During the close out stage, the Tenant Snagging Remedial occurs and the Tenant issues as-built drawings. The RDM issues the Documentation of Works and the Developer releases the Deposit and Deductions.

## Retail Delivery Services through different Agencies

### *Show Me Moving and Home Delivery*

We specialize in delivering the items from your warehouse to your customer's homes. Your customer has made the purchasing decision, paid for the item, and now you need a reliable, trusted partner who knows the importance of an on time, damage free delivery.

Whether you need professional, insured delivery service three times a week, once a month or a variation in between; whether you need threshold delivery or white glove service; whether you have your own program you'd like us to follow or you'd like us to customize a service to create efficiencies and maximize your profits; Show Me Moving and Home Delivery will deliver a hassle free experience to you and your customer.



With over 75 years of management experience, our team is dedicated to delivering a service that is developed to eliminate the obstacles that keep you from growing your business.

Interested in learning more about our services? Call our corporate office at 314.567.6060 and ask for Carrie, she wants to meet you from the beginning.

Tapping customers to deliver goods would put the world's largest retailer squarely in middle of a new phenomenon sometimes known as "crowd-sourcing," or the "sharing economy."

A plethora of start-ups now help people make money by renting out a spare room, a car, or even a cocktail dress, and Wal-Mart would in effect be inviting people to rent out space in their vehicle and their willingness to deliver packages to others.

Such an effort would, however, face numerous legal, regulatory and privacy obstacles, and Wal-Mart executives said it was at an early planning stage.

Wal-Mart is making a big push to ship online orders directly from stores, hoping to cut transportation costs and gain an edge over Amazon and other online retailers, which have no physical store locations. Wal-Mart does this at 25 stores currently, but plans to double that to 50 this year and could expand the program to hundreds of stores in the future.

Wal-Mart currently uses carriers like FedEx Corp for delivery from stores - or, in the case of a same-day delivery service called Walmart To Go that is being tested in five metro areas, its own delivery trucks.

### ***Retail Delivery by CKDC***

As an expert on retail delivery, CKDC will work with landlords to ensure they have best practice processes and procedures implemented within their business so that it operates with better efficiency to more expediently open shops, provide improved landlord-tenant relationships and enhance the landlord's retail brand and reputation.

CKDC can assist with:

- ✦ Assessing and critiquing current retail delivery processes
- ✦ Assessing current documentation and procedures
- ✦ Analyzing current personnel, consultants and resources and the operational framework they work within

- ✦ Recommending improved processes and procedures
- ✦ Preparing relevant documentation – Fit Out Guide, Site Constraints documents etc
- ✦ Implementing improved procedures
- ✦ Assisting with the procurement of additional specialized staff and consultants
- ✦ Training personnel on and rolling out new processes

### ***Retail Delivery Services Dynamex***

Through years of experience, Dynamex has developed industry-specific transportation and logistics solutions. Have a unique shipping need? Require logistics services support? Dynamex offers a variety of support services for all types of specialized delivery and logistical needs, including our retail logistics services.

#### **Retail Distribution**

Distribution and delivery across a global supply chain is becoming increasingly sophisticated and complex. Customer-focused enterprises are under increasing pressure to satisfy customers while reducing costs and streamlining operations. At the same time, they must comply with regulations from every region.

Wherever your goods must be moved or stored, Dynamex can develop the most efficient and effective way to meet your requirements in the US and Canada. Our proven retail distribution services make Dynamex the single, trusted resource for warehousing, third party logistics, and retail goods distribution. Flexibility and outstanding service ensures that your shipments make it to your stores complete and on-time.

When you need immediate delivery, both you and your customers can rely on Dynamex. Flexibility and outstanding courier service ensures that your shipments make it to your house complete and on-time.

Dynamex knows the sale cannot wait. Retail fulfillment is deadline sensitive and requires the goods be delivered at exactly the right place, at the right time, and in the right way. There is no margin for error.

#### **We offer**

- ✦ Product distribution management
- ✦ Inventory management and warehousing
- ✦ Electronic data interchange (EDI)



With Dynamex, you can be assured of having your products available, in the store, and on the shelf so your store staff can focus on customers and making a sale.

Dynamex offers a transportation and logistics solution designed just for your specific needs. We work with you to optimize your service levels and vehicle mix to provide the most cost-effective routing, handling, and delivery available.

### **Home Delivery Courier**

Home delivery across a global supply chain is becoming increasingly sophisticated and complex. Customer-focused enterprises are under increasing pressure to satisfy customers while reducing costs and streamlining operations. Dynamex is your long term solution for a seamless home delivery program. We are a leading network courier company serving a wide range of retailers and manufacturers including consumer electronics, appliances, home improvement, office supplies, and furniture companies throughout the United States. We specialize in all sizes and weights, white glove service, and weekend/holiday delivery.

Our success is due to extensive experience and expertise in managing numerous national and regional shipping programs. We provide extraordinary customer service and use state-of-the-art technology to provide you with the most efficient and cost-effective home delivery solutions in the retail and e-commerce industry.

Through years of transportation and logistics experience we have learned tried and true methods for successfully implementing and executing simple to complex programs. Dynamex has been operating in the market for many years, working in partnership with a range of leading manufacturers and retailers, providing services from order placement to final delivery.

### **E-Commerce Courier**

If your customers have to wait on the phone for every delivery, they may quickly turn into someone else's customers. With the time demands of e-mail and the Internet changing everyone's perceptions of speedy response, dxNow® brings an online advantage to your same-day shipping fulfillment needs. dxNow® is your online gateway to e-commerce.

Customers can remain ahead of the curve with our online courier solution for fulfilling all of your same-day delivery needs. With secure order entry, real-time tracking, and account management reporting, you have access to every aspect of the shipping process 24 hours a day, 365 days a year.

With Dynamex's e-commerce shipping solutions, order entry is quick and easy with your personalized address book and smart code referencing. Every order you place at dxNow® appears directly on Dynamex dispatch screens for seamless transmission to the appropriate driver with the right vehicle to handle your order immediately.

And, with online waybills and shipping labels ready to print, one click of your mouse has your package ready for pick-up.

During the shipping process, you can log on to your account to view real-time status updates, or choose to have pickup and delivery updates sent straight to your email, or your customer's email. Then, use our instant reporting system to generate customized management reports for online viewing or download. From start to finish, you are in control of your time-critical deliveries.

## **EXERCISE**

Interact with delivery department head of the store and write down the procedure followed by that store and problems encountered by the store in delivery procedures with practical solution of that problem by you.

### **A. Fill in the Blanks**

1. The retail delivery manager provides a single point of contact then balances the needs of \_\_\_\_\_ with the \_\_\_\_\_ required to meet the \_\_\_\_\_ date. (retailers, discipline, opening)
2. Retail delivery is the \_\_\_\_\_ process. (management)

### **B. Multiple Choice Questions**

1. Walmart same day delivery called Walmart To GO that to being listed in –
  - a) Five metros
  - b) Two metros
  - c) Three metros
  - d) None of the above
2. Retail fulfillment is require the goods be delivered at –
  - a) Right place
  - b) Right time
  - c) Right way
  - d) All the above





## CHECKLIST FOR ASSESSMENT ACTIVITY

### Part A

Use the following checklist to see if you have met all the requirements for Assessment Activity.

- ★ Identify delivery procedure in retail store.

### Part B

Discuss the following in Class Room:

- ★ Discuss delivery procedures.
- ★ Discuss web based delivery process.
- ★ Discuss different agencies providing delivery services.

### Part C

#### Performance Standards

The performance standard covered by the assessment includes the following, but not limited to:

Performance Standards	Yes	No
Able to identify delivery procedures.		
Able to identify agencies providing delivery services.		

## Session 4: Laws in Record Maintenance

### Relevant Knowledge

#### Maintenance and Access to Retail Sales Records

- (1) The retail sales records required under WAC 246-889-095 are confidential and accessible by the board of pharmacy and law enforcement agencies. Law enforcement may access the retail sales records for criminal investigations when, at a minimum, there is an articulated individualized suspicion of criminal activity.
- (2) Each law enforcement agency's administrator, chief, sheriff, or other chief executive officer shall ensure:
  - (a) Only authorized employees have access to the data bases;
  - (b) Each employee use his or her unique password or access code to access the data bases;

- (c) Each employee adheres to all state and federal laws regarding confidentiality; and
  - (d) As employees change, new passwords or access codes are assigned to new employees and passwords of ex-employees or transferred employees are removed.
- (3) Retail sales records of restricted products, electronic or written, must be kept for a minimum of two years.
- (4) Retail sales records must be destroyed in a manner that leaves the record unidentifiable and non-retrievable.

### **Maintenance of Records and Inventories**

- A. Except as provided in paragraphs (a)(1) and (a)(2) of this section 1304.04, every inventory and other records required to be kept under this part must be kept by the registrant and be available, for at least 2 years from the date of such inventory or records, for inspection and copying by authorized employees of the Administration.
1. Financial and shipping records (such as invoices and packing slips but not executed order forms subject to Sections 1305.17 and 1305.27 of this chapter) may be kept at a central location, rather than at the registered location, if the registrant has notified the Administration of his intention to keep central records. Written notification must be submitted by registered or certified mail, return receipt requested, in triplicate, to the Special Agent in Charge of the Administration in the area in which the registrant is located. Unless the registrant is informed by the Special Agent in Charge that permission to keep central records is denied, the registrant may maintain central records commencing 14 days after receipt of his notification by the Special Agent in Charge. All notifications must include the following:
- ✦ The nature of the records to be kept centrally.
  - ✦ The exact location where the records will be kept.
  - ✦ The name, address, DEA registration number and type of DEA registration of the registrant whose records are being maintained centrally.
  - ✦ Whether central records will be maintained in a manual, or computer readable, form.



2. A registered retail pharmacy that possesses additional registrations for automated dispensing systems at long term care facilities may keep all records required by this part for those additional registered sites at the retail pharmacy or other approved central location.
- B. All registrants that are authorized to maintain a central recordkeeping system under paragraph (a) of this section shall be subject to the following conditions:
- ✦ The records to be maintained at the central record location shall not include executed order forms and inventories, which shall be maintained at each registered location.
  - ✦ If the records are kept on microfilm, computer media or in any form requiring special equipment to render the records easily readable, the registrant shall provide access to such equipment with the records. If any code system is used (other than pricing information), a key to the code shall be provided to make the records understandable.
  - ✦ The registrant agrees to deliver all or any part of such records to the registered location within two business days upon receipt of a written request from the Administration for such records, and if the Administration chooses to do so in lieu of requiring delivery of such records to the registered location, to allow authorized employees of the Administration to inspect such records at the central location upon request by such employees without a warrant of any kind.
  - ✦ In the event that a registrant fails to comply with these conditions, the Special Agent in Charge may cancel such central recordkeeping authorization, and all other central recordkeeping authorizations held by the registrant without a hearing or other procedures. In the event of a cancellation of central recordkeeping authorizations under this paragraph the registrant shall, within the time specified by the Special Agent in Charge, comply with the requirements of this section that all records be kept at the registered location.
- C. Registrants need not notify the Special Agent in Charge or obtain central recordkeeping approval in order to maintain records on an in-house computer system.
- D. ARCOS participants who desire authorization to report from other than their registered locations must obtain a separate central reporting identifier. Request for

central reporting identifiers will be submitted to the ARCOS Unit. See the Table of DEA Mailing Addresses in Sec. 1321.01 of this chapter for the current mailing address.

- E. All central recordkeeping permits previously issued by the Administration expired September 30, 1980.
- F. Each registered manufacturer, distributor, importer, exporter, narcotic treatment program and compounder for narcotic treatment program shall maintain inventories and records of controlled substances as follows:
  - ✦ Inventories and records of controlled substances listed in Schedules I and II shall be maintained separately from all of the records of the registrant; and
  - ✦ Inventories and records of controlled substances listed in Schedules III, IV, and V shall be maintained either separately from all other records of the registrant or in such form that the information required is readily retrievable from the ordinary business records of the registrant.
- G. Each registered individual practitioner required to keep records and institutional practitioner shall maintain inventories and records of controlled substances in the manner prescribed in **paragraph (f)** of this section.
- H. Each registered pharmacy shall maintain the inventories and records of controlled substances as follows:
  - ✦ Inventories and records of all controlled substances listed in Schedule I and II shall be maintained separately from all other records of the pharmacy.
  - ✦ Paper prescriptions for Schedule II controlled substances shall be maintained at the registered location in a separate prescription file.
  - ✦ Inventories and records of Schedules III, IV, and V controlled substances shall be maintained either separately from all other records of the pharmacy or in such form that the information required is readily retrievable from ordinary business records of the pharmacy.
  - ✦ Paper prescriptions for Schedules III, IV, and V controlled substances shall be maintained at the registered location either in a separate prescription file for Schedules III, IV, and V controlled substances only or in such form that they are readily retrievable from the other prescription records of the pharmacy. Prescriptions will be deemed readily retrievable if, at the time they are



initially filed, the face of the prescription is stamped in red ink in the lower right corner with the letter "C" no less than 1 inch high and filed either in the prescription file for controlled substances listed in Schedules I and II or in the usual consecutively numbered prescription file for non controlled substances. However, if a pharmacy employs a computer application for prescriptions that permits identification by prescription number and retrieval of original documents by prescriber name, patient's name, drug dispensed, and date filled, then the requirement to mark the hard copy prescription with a red "C" is waived.

- ✦ Records of electronic prescriptions for controlled substances shall be maintained in an application that meets the requirements of part 1311 of this chapter. The computers on which the records are maintained may be located at another location, but the records must be readily retrievable at the registered location if requested by the Administration or other law enforcement agent. The electronic application must be capable of printing out or transferring the records in a format that is readily understandable to an Administration or other law enforcement agent at the registered location. Electronic copies of prescription records must be sortable by prescriber name, patient name, drug dispensed, and date filled.

### **Maintenance and Retention of Records**

Wholesale dealer shall maintain copies of invoices or equivalent documentation for each of its facilities for every transaction in which the wholesale dealer is the seller, purchaser, consignor, consignee or recipient of cigarettes. The invoices or documentation must indicate the name and address of the consignor, seller, purchaser or consignee, and the quantity by brand and style of the cigarettes involved in the transaction.

Retail dealer shall maintain copies of invoices or equivalent documentation for every transaction in which the retail dealer receives or purchases cigarettes at each of its facilities. The invoices or documentation must indicate the name and address of the wholesale dealer from whom, or the address of another facility of the same retail dealer from which, the cigarettes were received, and the quantity of each brand and style of the cigarettes received in the transaction.

Manufacturer shall maintain copies of invoices or equivalent documentation for each of its facilities for every transaction in which the manufacturer is the seller, purchaser,

consignor, consignee or recipient of cigarettes. The invoices or documentation must indicate the name and address of the consignor, seller, purchaser or consignee, and the quantity by brand and style of the cigarettes involved in the transaction.

The records required above must be preserved on the premises described in the license of the manufacturer, wholesale dealer or retail dealer in such a manner as to ensure permanency and accessibility for inspection at reasonable hours by authorized personnel of the Department. With the permission of the Department, manufacturers, wholesale dealers and retail dealers with multiple places of business may retain centralized records, but shall transmit duplicates of the invoices or the equivalent documentation to each place of business within 24 hours after the request of the Executive Director or his or her designee.

The records required by this section must be retained for not less than 3 years after the date of the transaction unless the Department authorizes, in writing, their earlier removal or destruction.

## **EXERCISE**

Write down the Record Maintenance Procedures of one retail store.

### **A. Fill in the Blanks**

1. The retail sales records required under WAC 246-889-095 are \_\_\_\_\_ and accessible by the law enforcement agencies. (confidential)
2. Only \_\_\_\_\_ employees have access to the data base. (authorized)
3. Retail dealer shall maintain copies of \_\_\_\_\_ or equivalent documentation for every \_\_\_\_\_. (invoices, transactions)

### **B. Multiple Choice Questions**

1. Retail sales records of restricted procedures, electronic or written must be kept for a minimum of –
  - a) Two years
  - b) Three years
  - c) Four years
  - d) Five years



2. The invoice or documentation must indicate –
- a) Name and address of consignor/ seller
  - b) Quantity by brand
  - c) Both of the above
  - d) None of the above

## CHECKLIST FOR ASSESSMENT ACTIVITY

### Part A

Use the following checklist to see if you have met all the requirements for Assessment Activity.

- ★ Describe record maintenance procedure.

### Part B

Discuss the following in Class Room:

- ★ Discuss legal procedures of record maintenance in retail environment.

### Part C

#### Performance Standards

The performance standard covered by the assessment includes the following, but not limited to:

Performance Standards	Yes	No
Able to identify laws of maintaining records.		



## Business Makeup Advice

Keep it simple and appropriate for daytime. Wearing no makeup at all is almost as bad as wearing too much makeup.

## Appropriate Jewelry for Business Women

Jewelry should not be noisy (no metal bangle bracelets), too large, or costume jewelry. Keep earrings small, simple, and above the earlobe.

It is better to wear no jewelry at all, than to wear too much jewelry. But all businesswomen should at least wear a nice, conservative wristwatch.

Demonstrating that you care about your personal appearance communicates to the person you are meeting with that they are important to you. Paying attention to the details of your appearance sends a message to others that you will also pay close attention to business details, and the needs of your customers and clients.

## What to do if you are injured on the job

By law, you are required to report any work-related injury to your supervisor and first aid attendant as soon as possible.

## First Aid Facilities

Every workplace has to provide some level of first aid. For a small, low-hazard workplace close to a medical facility, a first aid kit may be all that is required. Larger worksites may require a first aid attendant and possibly a first aid room. During your orientation, you should find out specific information about first aid procedures in the workplace, including:

- ★ How and when to report an injury
- ★ Who to report the incident to
- ★ Where to find a first aid attendant, first aid room, or first aid kit
- ★ If transport to hospital is required, your employer is required to pay for it.

## Reporting Injuries

For injuries, this generally means you must have been working when you were hurt and the injury must have been caused by something to do with your job. For a disease, this means that the work or the work environment must cause the disease.



## Investigating Accidents

If an accident happens, your employer should have a system for investigating it and reporting it to the management. Your responsibility in the process is to be as helpful as you can to your employer and higher officers to get at the cause of the accident.

### EXERCISE

1. Prepare a checklist of the personal grooming activities

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2. Visit an organization or departmental store and using the checklist prepared by you, observe the personal grooming tips adopted.

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3. List out what are the personal grooming tips required for working in the retail outlets.

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### A. Fill in the blanks

1. Knowledge of stylish \_\_\_\_\_ and \_\_\_\_\_ can give professional touch to your food. (cutlery, crockery)
2. Learn \_\_\_\_\_ to try new culinary experiences with international cuisines. (creativity)
3. To complete your professional look you must also consider \_\_\_\_\_ and personal \_\_\_\_\_. (accessories, grooming)
4. Nail \_\_\_\_\_ and nail \_\_\_\_\_ are not acceptable for business meetings. (art, jewels)
5. Every workplace has to provide some level of \_\_\_\_\_. (first aid)

### B. Multiple choice questions

1. The following aspects are the key to a happy and peaceful relationship and journey ahead.
  - a) Right attitude
  - b) Grooming
  - c) Presentations
  - d) Conversations
  - e) All the above
2. A woman's professional appearance needs to support her professional.....
  - a) Growth
  - b) Ethics
  - c) Development
  - d) Accomplishments
3. Appropriate Jewelry for Business Women are
  - a) Should not be noisy
  - b) Too large
  - c) Costume jewelry
  - d) All the Above

### C. Short Answer Questions

1. What is the meaning of stylish cutlery and crockery?
2. Explain major grooming tips for businesswomen?

### CHECKLIST FOR ASSESSMENT OF ACTIVITY

Use the following checklist to see if you've met all the requirements for Assessment Activity.

#### Part A

- ✦ Perform the personal grooming skills.
- ✦ Differentiated various equipment and creams used for personal grooming Tips.

#### Part B

- a) What are the equipments and material used for personal grooming?
- b) What are the major personal grooming tips?

#### Part C

##### Performance Standards

The Performance standards may include, but not limited to:

Performance Standards	Yes	No
Able to practice personal grooming tips		



# Checklist

This checklist can be used as an aid in assessing and controlling hazards in the retail sector. The checklist is not an exhaustive list of items to be addressed as there may be specific hazards relevant to your workplace.

**If you answer NO to any of the following questions, you need to put corrective action in place**

Management of Health and Safety	Yes	No	What Action Required	A Date Corrective Action to be Implemented
Have you prepared a safety statement				
Have staff been made aware of the safety statement				
Have you identified hazards				
Have you prepared a risk assessment				
Have you put required controls in place				
Have you recorded all the risk assessment & controls in your safety statement				
Do you review this safety statement atleast annually				
Do you revise your safety statement whenever new hazards are introduced				
Have employees received adequate information				
Have employees received adequate instruction & training to enable them to carry out duties safely				
Is there a system in place to ensure non-English speaking employees understand the safety training, rules and procedures				
<b>A-Z of Hazards:</b>				
<b>BULLYING</b>				
Is there a written bullying prevention policy				
Have staff been made aware of the policy				
Do staff have access to this policy				
<b>CHEMICALS</b>				
Are staff provided with information on any chemicals they may use				
Are they aware not to mix chlorine bleaches with other chemicals				
Do they have appropriate personal protective equipment(PPE) e.g. gloves, masks, aprons				
Are cleaning agents stored safely away				

Are safety data sheets available (SDS's)				
<b>COLD ROOMS</b>				
Are suitable gloves provided for handling frozen surfaces and products				
Is there proper storage to avoid excessive bending, twisting or reaching				
Is there a means of opening a cold room door from the inside				
If locked at night, is there a procedure to ensure no one is trapped inside				
<b>ELECTRICITY</b>				
Are leads & sockets regularly checked for wear & fraying				
Have you a Residual Current Device (RCD)				
Are all RCD's tested every 6 months				
Have you investigated causes for trip switches if they are activated				
<b>FIRE</b>				
Is rubbish removed frequently				
Are escape routes clear				
Are emergency exits unlocked				
Do emergency exits open outwards				
Are fire extinguishers provided				
Are fire extinguishers maintained				
Are staff aware of procedure in event of fire				
Are fire drills carried out at least twice/year				
Can disabled persons be evacuated safely				
<b>FIRST AID</b>				
Is suitably marked & easily accessible 1st				
Aid equipment provided				
Are first aid boxes checked and maintained regularly				
Is a qualified 1st aider available or suitable arrangements made with neighboring premises				
Are names, addresses & telephone numbers of local emergency services clearly displayed				
<b>LOADING/UNLOADING</b>				
Is there a designated area for loading/ unloading				
Is this area blocked off from pedestrians until loading is complete				
Are timber pallets checked regularly for defects				
Are staff trained in use of pallet trucks				
If fork lift trucks are used, is there a trained				



FLT Driver				
Is FLT certified				
<b>MACHINERY AND EQUIPMENT</b>				
Does all machinery have guards in place (e.g. slices/mincers)				
Do staff know to unplug or isolate equipment before cleaning or maintaining it				
Are compactor safety interlock switches operating to prevent access while in operation				
Are compactors located away from public				
Are employees instructed in risks and correct use of all machinery				
<b>MANUAL HANDLING</b>				
Have you carried out a risk assessment of remaining manual handling tasks				
Can large loads be broken down to acceptable weights				
Have you provided lifting aids such as trolleys, pallet trucks, lifts etc for necessary manual handling tasks				
Have you arranged storage areas so twisting, turning and overreaching is minimized				
Have you minimized the need to reach above shoulder height				
Have you minimized tasks involving awkward postures				
<b>SENSITIVE RISK GROUPS</b>				
<b>A) CHILDREN &amp; YOUNG PERSONS</b>				
Have you carried out a risk assessment before employing a child (under 16) or young person (16 or over but less than 18yrs) taking into account their lack of experience, absence of awareness of potential risks or lack of maturity				
<b>B) NIGHT WORK &amp; SHIFT WORK</b>				
Have you carried out a night work risk assessment				
Have you taken appropriate steps, if any, to protect the safety & health of a night/shift worker				
<b>C) PREGNANT EMPLOYEES</b>				
Have you assessed any specific risks to a pregnant employee to ensure that she is not exposed to anything in the workplace that will damage either her safety or health or that of her developing child.				
If there are specific risks, have you put measures in place to ensure exposure to the risk is avoided for pregnant employee				

<b>SLIPS, TRIPS AND FALLS</b>				
Are aisles, stairs and working areas kept clear				
Are trailing cables rerouted or tied down				
Have you a system in place for cleaning spillages immediately Is flooring in good condition				
Are adequate levels of lighting provided and maintained				
<b>STORAGE AND RACKING</b>				
Are boxes stored safely to prevent objects falling or collapsing				
Are there safe means of transporting goods between floors				
Are there safe means to access goods e.g. platform steps				
Is racking/storage shelving secure, stable & suitable to prevent risk of material falling				
<b>VIOLENCE</b>				
Are staff trained to deal with aggression/violence				
Have you reduced the amount of available cash using time locked safes etc				
Have you a private area for counting/managing cash				
Have you a system in place to deter violence e.g. signs/security/surveillance equipment				
Have you means of raising the alarm				
Have you a system in place for lone workers				
Do staff vary routes/times to bank				
Have you identified higher risk times & put extra precautions in place				
<b>WELFARE FACILITIES</b>				
Are comfortable temperatures maintained – a minimum of 16c for light work, 17.5c for sedentary office work				
Is sufficient fresh air provided				
Are adequate sanitary and washing facilities provided				
Are there suitable and adequate facilities for taking meals and boiling water				
Is there an adequate supply of potable drinking water				
Do you provide seating where employees can sit as well as stand to do work				
<b>WORK RELATED STRESS</b>				
Has a risk assessment been carried out for work related stress				

## Unit-2: RetailStoreOperations

<b>Unit Code:</b> RS203- NQ2012	<b>Unit Title: Store Operations</b>			
<b>Location:</b> Classroom, Retail shop store operations	<b>Duration: 15 hours</b>			
	<b>Session-1: Store Layout</b>			
	<b>Learning Outcome</b>	<b>Knowledge Evaluation</b>	<b>Performance Evaluation</b>	<b>Teaching and Training Method</b>
	1. Competencies required for store operations in retail knowledge	1. State whether the site is nearer to target market. 2. Describe the store area. 3. Describe the sources of power and water available. 4. State the components of the store layout	1. Differentiate between store area and retail area. 2. Store site compatible with retail shopping. 3. Describe the store layout. 4. Design of store layout. 5. Differentiate between different types of store layout	<b>Interactive lecture:</b> Store Operations <b>Activity:</b> 1. Visit a retail mall and understand the job responsibility of how store layout are designed and formed. 2. Work in retail store with the responsibility and function as store assistant.
	2. Identify the Formalities required for store layout.	1. State the design and location of stores. 2. Steps involved in preparing store layout. 3. Steps involved in identification of store location.	1. Differentiate the store layout with business layout operation. 2. Evaluate the compatibility of the store layout with location of potential customer. 3. Identify the market in respect of store location.	<b>Interactive lecture:</b> Forming Store Layout and Design. <b>Activity:</b> 1. Visit retail store and learn how the store layout is drawn. 2. Design a small independent store layout for one product with reference to commercial operations in retail outlet. 3. Visit to a retail format & formalities.
	3. Describe the Location and proportion of space through numeric and	1. Planning a layout for the stores interior. 2. Describe the allocation of	1. Enlist the function of store space and planning of store layout.	<b>Interactive Lecture:</b> Store planning, designing layouts, forming stores, planning and





	visual space planning	space based on sales, margins, products and strategy.	2. Differentiate store planner, architect and interior designer. 3. Calculate proportion of space through numeric and visual space planning	organizing retail store layouts. <b>Activity:</b> 1. Work with retail store planner and learn the store layout designing. 2. Visit a store in more than three retail malls and note down the salient features of how store layout is formed.
	<b>Session -2: Store Design</b>			
	1. Describe the elements of store planning and design	1. Describe the elements (store design objectives, selling space, merchandise space, employee space, customer space, display areas, fixture arrangements, etc.)	1. Demonstrate the knowledge of the elements of store design 2. Differentiate between selling area, circulation area and back area	<b>Interactive lecture:</b> Store Design <b>Activity:</b> Visit to a retail store to study the store layout and design
	2. Identify the tips for Retail Store Design	1. Store frontage, signage, furniture, display, lighting, decoration. 2. Tips for retail Store design	1. Differentiate the functions of stores space with store decoration. 2. Identify the tips in valued in retail store design	<b>Interactive Lecture:</b> Store space creation, furniture arrangements, merchandising display. <b>Activity:</b> Work with retail store planner and learn the store layout designing.
	<b>Session-3: Store Procedures</b>			
	1. Describe the competencies of core areas in store procedures	1. Learn core areas like store exterior, store interior, customer service, merchandise management.	1. Identify the function of stores procedures, at the entry level. 2. Find out the responsibility of entry level store procedures followed.	<b>Interactive Lecture:</b> Competencies of core areas in store procedure <b>Activity:</b> On-the-job or internship in a store anagement job in the retail sector.
	2. Identify the competitive	1. Learn from advertising	1. List out the competitive	<b>Interactive Lecture:</b> Process of store

	analysis of store promotions.	agency, public relation firm, marketing specialist to promote the products through retail.	analysis of store promotions 2. Take responsibilities to handle promotions of a new product through advertising.	procedures and promotion of a product. <b>Activity:</b> Practically work in a retail store to understand the product promotions.
	3. Identify the opening & closing procedures in retail store	1. Opening procedures in retail store 2. Closing procedures in retail store	1. Identify the opening procedures in retail store 2. Explain the formalities required for closing the retail store	<b>Interactive Lecture:</b> Opening & closing procedures in retail store <b>Activity:</b> Practically work in a retail store to complete for open & close the retail store.
	<b>Session-4: Store Maintenance</b>			
	1. Managing the operations and maintenance of the retail stores.	1. Cleanliness of the store premises depend on the maintenance of the store still merchandising with the customer goes on.	1. Differentiate between maintenance and administration of store. 2. Operate simple product handling with merchandising by maintaining flow of stocks. 3. Determines the business hours and the target audience of the stores.	<b>Interactive Lecture:</b> Process of store maintenance. <b>Activity:</b> On-the-job in a super market store and learn the process of handling and maintenance.
	2. Manage the receipts of products issued from store.	1. Product procurement & issues of products.	1. Identify the product movements from the stores and purchase items by the customers. 2. Maintain the receipts of products issued from store	<b>Interactive Lecture:</b> On movement of products issued from stores to the retail section. <b>Activity:</b> On job orientation of receipts and issue of product from the stores.



## Introduction

In our daily life, we come across retail shops in the nearby residential areas or shopping malls. Retailing affects every facet of our life. Have you ever thought how many daily contacts we have with retailers when we eat meals furnish our home, have our car fixed, and buy clothing for a party? A **retail store** is a business that sells products and/or services to consumers for their personal or family use. If you look around, you will find different forms of retail stores such as departmental stores, discount stores, variety stores, speciality stores, convenience stores.



Retailers provide the goods and services you and I need—from food, auto parts, apparel, home furnishings, appliances, and electronics to advice, home improvement, and skilled labor. Let's take a look behind the scenes at the many facets of this exciting business.

A retail store is also classified by the type of products they sell, for example food products, durable goods (appliances, electronics, furniture, sporting goods, etc.) and soft goods or consumables (clothing, apparel, and fabrics). Often people think of retailing which are sold and bought in stores, but retailing also involves the sale of services: staying in a hotel while on vacations, a haircut saloon or a beauty parlour, a DVD rental, or a home-delivered pizza. Not all retailing is done in stores. Examples of non-store retailing include online selling or the direct sales of cosmetics by Amway.

Store operations is operating and overseeing all the functions of the store from setting up shop, deciding what type of products you want to sell, deciding on what type of customers you are trying to attract into your store, then ordering the products, hiring personnel, pricing the products, deciding on a location, taking an inventory, advertising the products, etc. Whatever form, the retail store enters into for buying and selling, every retailer rolls out a standard operation procedure (SOP) which includes all functions of operating relating to customer service, health safety and protection, maintenance and distribution.

In this Unit, the student will be learn about the basic principles of a store operations which includes the store layout, store design, store procedures and store maintenance.

## Session 1: Store Layout

### Relevant Knowledge

Store layout and design plays an important role in defining the store image. The store layout and design tell a customer what the store is all about. It is very strong tool to create store image in the minds of the consumers. It is defined as a physical location of various units of the stores that facilitate shoppers. It is a plan to make effective use of space. It takes into account the customer flow pattern, display of merchandise, permanent structures like aisles and fixtures.

### Good Layout for a Retail Store

The success of a retail store is influenced by its layout design and the ambience (atmosphere) created by the retailers. You never get a second chance to make a first impression. This age old saying is especially true in relation to design and atmosphere of a retail store. The first impression given to the potential customer determines whether the retail store has gained or lost a buyer. The basic functional principle of a retail store is to show the products and sell the product. Both these activities require a space to accommodate products, services and people.

### Space

The space needed for a retail store differs with the nature of the retail store. It could be a fixed location in a building, a more flexible location like a market tent often seen in fairs, or a mobile space like an ice cream cart or a street vendor.

### Considerations for the Store Layout

A good store layout serves many purposes:

- ★ **Store Atmosphere:** The physical characteristics and surrounding influence of a retail store creates an image in order to attract customers. The store must offer a positive ambience to the customers for them to enjoy their shopping and leave with a smile.
  - The store should not give a cluttered look.
  - The products should be properly arranged on the shelves according to their sizes and patterns. Make sure products do not fall off the shelves.
  - There should be no foul smell in the store.
  - The floor, ceiling, carpet, walls and even the mannequins should not have unwanted spots.



- Never dump unnecessary packing boxes, hangers or clothes in the dressing room. Keep it clean.
- Make sure the customers are well attended.
- Don't allow customers to carry eatables inside the store.
- ★ **Enhance Sales:** The store layout should enable the customers to move around the store conveniently. This is done by preparing a circulation plan.

Circulation is an invisible force which revolves around the customers so that they cover the entire range of merchandise under display leading to maximize the purchase. Normally the destination category is kept in the last so that the customer is forced to walk up the entire store. In this way, the retail store owner tempts the customer to make impulsive buying. You must have noticed in a grocery shop that the popular items such as milk, curd are kept at the end. Why? Because they are necessary items and customers will certainly lay hands on them however far they are placed. If they are laid at the entry of the store, the customer will always remain foreign to the rest of the store. Ultimately, the aim is to make sales and earn profit.
- ★ **Maximize Returns per Square Foot:** A well planned layout enhances the utilization of customer's time and best of the shopping experience. A good layout provides a balance between available space for display and the return on productivity. In this way, it becomes important to decide the alternative design types, allocating space for bulk stock selling and effective use of walls and windows. These provide opportunity to customers to move around and experience the products in a much better way.
- ★ **Match the merchandise with the format:** retail stores are designed to target the specific kind's of customers. Have you visited the music stores like Planet M, Music World etc? What kind of ambience do you find? On the other hand, compare it with the designer boutique, jeweler shop or a home fashion store. Do you see any difference the ways store layout is treated? A music store focuses on youth so the fixtures are heavy filled by flashing lights and lively music. Whereas, the later categorized stores have lighter and organised serene ambience to capture the mood of customers. Therefore, different types of target groups by age, education, gender affect the store design, ambience and layout.
- ★ **Assistance for differently abled women, children and safety of customers**

The layout for the store should provide convenience for variety of shopper's visiting it. Now, if you visit the retail stores, Kine Globus, shoppers stop,

pantaloon etc., we will observe the stores arrange for handicap access along with the rooms for mothers with babies and rest rooms for old people.

Care is taken that the furniture have no sharp edges and the flooring is not slippery. The main aisles are wide to avoid cramping during peak shopping seasons.

Hence, the importance of layout can be summarized in the following manner:

1. It guides the flow of customers to all parts of the store showcasing the best of merchandise offered on sale.
2. It provide for impulsive buying.
3. It permits the store to maximize the use of space in relation to non selling space in the store.
4. It aids the customer in selecting and comparing merchandise
5. It leads to maximize sales.

### Steps for Designing Store Layout

Planning a store layout involves the following steps:

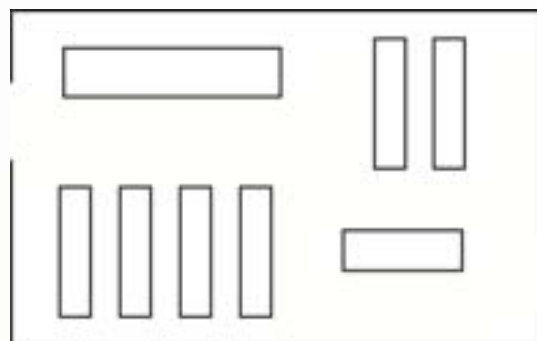
1. Determining the availability of space.
2. Determining 'space needs' for selling and non selling area.
3. Fitting 'space needs' for good customer flow and maximum sales per square foot.
4. Provision for self service
5. Types of merchandise presentation techniques.

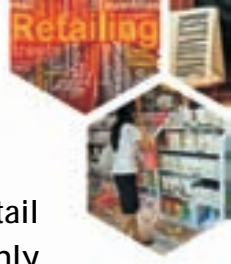
### Forms of Layout in Retail Store

The retailer must plan out each and everything well, the location of the shelves or racks to display the merchandise, the position of the mannequins or the cash counter and so on.

#### 1. Straight Floor Plan

The straight floor plan makes optimum use of the walls, and utilizes the space in





the most judicious manner. The straight floor plan creates spaces within the retail store for the customers to move and shop freely. It is one of the commonly implemented store designs. This type of design you find in Reebok and Nike.

### ***Advantages***

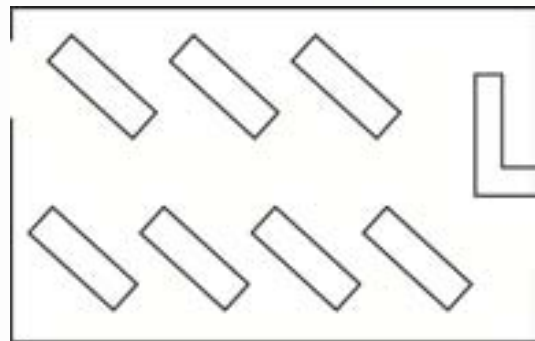
1. Motivates shoppers to spend time and explore the merchandise.
2. Maximizes sale through impulsive buying.
3. Appropriate for stores where selling approach is consultative and personal.

### ***Disadvantages***

1. Inefficient use of space resources.
2. As vision is blocked, the chances of shop lifting are higher.

## **2. Diagonal Floor Plan**

According to the diagonal floor plan, the shelves or racks are kept diagonal to each other for the owner or the store manager to have a watch on the customers.



Diagonal floor plan works well in stores where customers have the liberty to walk in and pick up merchandise on their own. The major customer aisles begins at the entrance, loops through the store and returns the customer to the front of the store generally used in departmental stores. Examples are Ritu wears, Shopper's stop.

### ***Advantages***

1. Loops facilitate impulsive buying. The latest or fashion merchandise is prominently displayed on the main aisles.
2. Overhead directional signs and departmental graphics provide visual cues to the location of other departments helping shoppers while they shop.

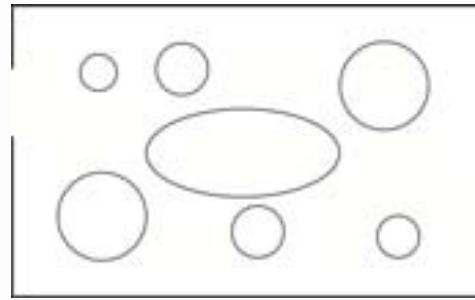
### ***Disadvantage***

1. This layout is costlier to design, construct and maintain.



### 3. Angular Floor Plan

The fixtures and walls are given a curved look to add to the style of the store. Angular floor plan gives a more sophisticated look to the store. Such layouts are often seen in high end stores. You generally find it in grocery stores, drug stores.



An example of such type of layout is Reliance Fresh.

#### *Advantages*

1. Methodological, efficient and convenient.
2. Visibility of merchandise is better.
3. Useful in self service.
4. Effective use of space and cost efficient.
5. Easy maintenance of selling area.

#### *Disadvantages*

1. Not very aesthetic, looks clumsy and the very principle of impulsive selling is not served.

### 4. Mixed Layout

This type of layout blends the advantages of straight floor and diagonal store layout thereby eliminating the disadvantages of both. In spine layout, the main aisle runs through front to the back of the store transporting the customers in both directions. On the either side of this spine, the merchandise departments use either the straight floor or diagonal layout which branches out towards the back aisle walls. You find this type of store layout in United Colors of Benetton.

## EXERCISE

1. Visit a retail store, interact with the store owner/store personnel and customers and ask the following questions and write their reply in not more than 50 words:

#### **Questions for Store Owner/Store Personnel**

- (i) How the types of fixtures, merchandise presentation methods and techniques are planned and help in sales floor.





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(ii) How has store design led to the store's success.

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(iii) How has aesthetic ambience and visual communications increased the store productivity.

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#### Questions for the Customers

##### *Testing the Store Image from Customers*

(iv) Is the shopper able to determine:

- a) Store's Name
- b) Line of Trade
- c) Price Position
- d) Ambience and store environment

(v) Do you visit the store again for shopping centre \_\_\_\_\_ y/n

If yes, the most preferred point for return

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If no, state why.

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**A. Fill in the blanks**

1. A retail store space is divided into \_\_\_\_\_ and \_\_\_\_\_.
2. Three important forms of store layout are \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.
3. The primary objective of a retail store is to \_\_\_\_\_.
4. \_\_\_\_\_ is the key to success in a retail business.
5. \_\_\_\_\_ and \_\_\_\_\_ leads to the long term relation of customer with the retail store.

**B. Multiple Choice Questions**

Tick the correct answer

1. The purpose of effective store layout is
  - (a) To earn profit
  - (b) Better shopping experience to customers
  - (c) Attract the target potential customers
  - (d) All of the above
2. Ideally, a store design should include:
  - (a) Adequate non selling space for the assorting the stocks
  - (b) Big room for the stores manage
  - (c) Maximum returns per square foot and flexibility in store design
  - (d) None of the above
3. The blend of straight floor and diagonal floor layout is called
  - (a) Free flow layout
  - (b) Grid layout
  - (c) Rack Layout
  - (d) Spine layout
4. Nutritional imbalance and digestive disorder results in increased occurrence of
  - (a) Obesity
  - (b) Body strength



- (c) Performance
  - (d) All of the above
5. The ISO specified Symbol for the First Aid Kit is
- (a) Red Cross on a green background.
  - (b) White Cross on a green background.
  - (c) Red Cross on a white background.
  - (d) Green Cross on a white background.

### CHECKLIST FOR ASSESSMENT ACTIVITY

Use the following checklist to see if you've met all the requirements for Assessment Activity.

#### Part A

- ★ What do you mean by the store layout?
- ★ State the considerations for store layout?
- ★ Explain the forms of retail store layout?

#### Part B

Discussed in class the following:

- ★ Importance of store layout and design in a retail store
- ★ Steps for designing retail store layout.
- ★ Differentiate between the store design and store layout.
- ★ Different forms of retail store layouts.
- ★ Planning a retail store layout

#### Part C

##### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to identify the suitability of retail store layout as per the nature of business.		
Able to demonstrate the steps for designing retail store layout.		

## Session 2: Store Design

### Relevant Knowledge

Designing a store layout includes deciding the best methods of presenting goods to the customer. Goods are presented either on shelving units, hanging from something, on pegboard, stacked or placed on dump tables. The methods determined are designed to optimize sales volumes.

#### Objectives for a Store Design

- (1) Implement the retailer's strategy,
- (2) Influence customer buying behavior,
- (3) Provide flexibility,
- (4) Control design and maintenance costs, and
- (5) Meet legal requirements.

Typically, a store design cannot achieve all of these objectives, so managers make trade-offs among objectives, such as providing convenience versus encouraging exploration.

#### Elements of Store Design

The basic elements in a design that guide customers through the store are the layout, signage, and feature areas. A good store layout helps customers to find and purchase merchandise. Several types of layouts commonly used by retailers are the grid, race track, and free-form. The grid design is best for stores in which customers are expected to explore the entire store, such as grocery stores and drugstores. Racetrack designs are more common in large upscale stores like department stores. Free-form designs are usually found in small specialty stores and within large stores' departments.

Signage and graphics help customers locate specific products and departments, provide product information, and suggest items or special purchases. In addition, graphics, such as photo panels, can enhance the store environment and the store's image. Digital signage has several advantages over traditional printed signage, but the initial fixed costs have made the adoption of this technology slow. Feature areas are areas within a store designed to get the customer's attention. They include freestanding displays, end caps, promotional aisles or areas, windows, cash wraps or point-of-sale areas, and walls.

Space management involves two decisions: (1) the allocation of store space to merchandise categories and brands and (2) the location of departments or merchandise



categories in the store. Some factors that retailers consider when deciding how much floor or shelf space to allocate to merchandise categories and brands are (1) the productivity of the allocated space, (2) the merchandise's inventory turnover, (3) impact on store sales, and (4) the display needs for the merchandise. When evaluating the productivity of retail space, retailers generally use sales per square foot or sales per linear foot.

The location of merchandise categories also plays a role in how customers navigate through the store. By strategically placing impulse and demand/destination merchandise throughout the store, retailers can increase the chances that customers will shop the entire store and that their attention will be focused on the merchandise that the retailer is most interested in selling. In locating merchandise categories, retailers need to consider typical consumer shopping patterns.

Retailers utilize various forms of atmospherics—lighting, colors, music, and scent—to influence shopping behavior. The use of these atmospherics can create a calming environment for task-oriented shoppers or an exciting environment for recreational shoppers.

The goal of any retail location is to draw customers into the store and then persuade them to make a purchase. Good advertising and promotion work to bring customers in, but what happens once customers get into a store largely depends on the layout and design of the store. Both play a huge role in how customers rate their experiences and whether they decide to buy, and if they return or recommend the store to others.

Opening a retail store can reap many rewards. Retail stores must offer a unique environment that set them apart from others. Well-planned retail store design ideas concerning layout should allow a retailer to maximize sales for each foot of the allocated selling space within the store. By utilizing a grid wall, for example, a retail store can accommodate almost any product. Every inch of every available space must be efficiently planned for maximum display advantage. Nothing is an accident when it comes to retail store design ideas.

A retailer should study successful floor plans and retail store design ideas. One of the secrets to successful sales is to create the right atmosphere. Selling is a seduction of sorts and setting the mood is part of the equation. Lighting is very important; it should be bright enough to enable customers to easily see products but not too harsh. Spotlights can call attention to specific items. It is very important to select and care for store fixtures, as well as using special lighting techniques to accent your products.

## Tips for Store Design and Layout

The signage displaying the name and logo of the store must be installed at a place where it is visible to all, even from a distance. Don't add too much information.

- ✦ The store must offer a positive ambience to the customers. The customers must leave the store with a smile.
- ✦ Make sure the mannequins are according to the target market and display the latest trends. The clothes should look fitted on the dummies without using unnecessary pins. The position of the dummies must be changed from time to time to avoid monotony.
- ✦ The trial rooms should have mirrors and must be kept clean. Do not dump unnecessary boxes or hangers in the dressing room.
- ✦ The retailer must choose the right colour for the walls to set the mood of the customers. Prefer light and subtle shades.
- ✦ The fixtures or furniture should not act as an object of obstacle. Don't unnecessary add too many types of furniture at your store.
- ✦ The merchandise should be well arranged and organized on the racks assigned for them. The shelves must carry necessary labels for the customers to easily locate the products they need. Make sure the products do not fall off the shelves.
- ✦ Never play loud music at the store.
- ✦ The store should be adequately lit so that the products are easily visible to the customers. Replace burned out lights immediately.
- ✦ The floor tiles, ceilings, carpet and the racks should be kept clean and stain free.
- ✦ There should be no bad odor at the store as it irritates the customers.
- ✦ Do not stock anything at the entrance or exit of the store to block the way of the customers. The customers should be able to move freely in the store.

The retailer must plan his store in a way which minimizes theft or shop lifting.

- (i) Merchandise should never be displayed at the entrance or exit of the store.
- (ii) Expensive products like watches, jeweler, precious stones, mobile handsets and so on must be kept in locked cabinets.
- (iii) Install cameras, CCTVs to have a closed look on the customers.
- (iv) Instruct the store manager or the sales representatives to try and assist all the customers who come for shopping.



- (v) Ask the customers to deposit their carry bags at the entrance itself.
- (vi) Do not allow the customers to carry more than three dresses at one time to the trial room.

### EXERCISE

- (i) What are the objectives of store design?

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- (ii) State the elements of store design?

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- (iii) Explain the tips for store design and layout?

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- (iv) What precautions are taken to minimize theft/ shop lifting?

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#### A. Fill in the blanks

1. The store should be adequately lit so that the products are easily visible to the \_\_\_\_\_. (customers)
2. The trial rooms should have the \_\_\_\_\_ and must be kept clean. (mirrors)

#### B. True or false

1. Free-form designs are usually found in small specialty stores and within large stores' departments. (T)
2. A good store layout does not help customers to find and purchase merchandise. (F)
3. The goal of retail location is to draw customers into the store and then persuade them to make a purchase. (T)
4. Merchandise should be always displayed at the entrance or exit of the store. (F)

5. Signage and graphics help customers to locate specific products and departments, provide product information, and suggest items or special purchases. (T)

### CHECKLIST FOR ASSESSMENT ACTIVITY

Use the following checklist to see if you've met all the requirements for Assessment Activity.

#### Part A

- ✦ State the elements of store design?
- ✦ What are the objectives of store design?
- ✦ Explain the tips for store design and layout?
- ✦ What precautions are taken to minimize theft/ shop lifting?

#### Part B

- ✦ Differentiate between the store layout and design.
- ✦ Explain the tips for store design and layout.

#### Part C

#### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to identify the objectives of store design.		
Able to find out the tips for store design and layout.		

## Session 3: Store Procedures

### Relevant Knowledge

Store operation resources and daily procedures creating internal controls for establishing retailing functions of the retail stores. The best time to establish policies and procedures for your retail business is during the planning stages. By anticipating problems before you open your doors, you can strategize how you'll handle special situations, as well as the normal day to day operations. This helps avoid making mistakes once you're faced with customers.





## Standard Operating Procedures in Retail

Standard Operating Procedure (SOP) is a set of written instructions that document a routine or repetitive activity followed by an organization. Operational procedures are vital to the business of running a retail store. Procedures typically cover all activities in the store, from sales transactions to customer support to inventory. The development and use of SOP has various advantages for the organization. Following standard operating procedures increases sales, boosts worker productivity and enhances a store's image.

## Standardization

An SOP minimizes the variation and promotes standardization through consistent implementation of a process or procedure within the organization.

## Technology

Retail stores use some type of business software or point-of-sale system to track sales. This allows managers to determine what products are selling well and helps them track inventory. Retailers often use this electronic information to generate product orders when replenishing stock levels.

## Inventory Management

Inventory management procedures pertain to the handling of products in a store. These procedures include receipt of inventory by verifying that each product is in the order as quoted; regular counting of inventory; and installing cameras or mirrors to limit or prohibit theft.

## Marketing

Retailers use marketing strategies to draw customers into the store and entice them to purchase goods or services. Marketing tools include radio, newspaper and television advertisements; special pricing; in-store promotions; and signs outside the store to attract buyers.

## Labor Practices

Employees are typically a large expense for retailers. Companies often devise schedules to ensure enough workers are available to cover the business' needs without increasing operating costs. Retailers sometimes hire younger people willing to work for lower wages to save the company money.

## Store Procedures in regard to Exchanges and Returns

Depending on the size of the retailer, other transactions may take place at the point-of-sale. Small retailers commonly deal with lay-by, returns and exchanges at the point of sale area, whereas larger retailers may have a dedicated section dealing with these other transactions. The necessary documentation must be completed accurately and efficiently to facilitate the transaction.

### Common Transactions Include:

- ★ Lay-by – allows goods to be purchased by installments. The goods remain the property of the retailer until they are paid for in full. The procedure for laybys varies according to the retailer's policy and procedures; however there are strict guidelines that all retailers must adhere to.
- ★ Refund or exchange of goods – certain conditions must be met for retailers to refund money for goods returned or exchange items. Refunds are governed by law under the NSW Fair Trading Act 1987, and the Trade Practices Act 1974. The Australian Competition & Consumer Corporation (ACCC) is charged with enforcing statutory rights under the Act.

In a retail environment, opening and closing times present unique security risks. At these times, employees are particularly vulnerable to robbery. The following policy can be modified for any retail business that stores cash and valuables such as banks and jewellery stores.

This procedure assumes that the store has an alarm system designed to arm/disarm the premise alarms (motion detectors, door and window contacts, etc.) and burglar alarms (safes, vaults and other storage containers) separately. The policy can easily be modified to accommodate other alarm system configurations.

### Opening Procedure

At least two employees must be present to open the facility. One employee will enter the facility, while the other waits outside in a locked vehicle with access to a mobile phone. The outside employee will maintain a clear view of the facility and wait for the predetermined all clear signal from his/her associate.

If the outside employee notices anything suspicious, or does not see the all clear signal in a reasonable period of time, he/she will immediately call police and then call the company's security department.



Upon entering the facility, the inside employee will relock the front door and disarm the premise alarm system. If the employee is threatened while disarming the system, he/she will enter a duress code into the alarm system keypad.

After disarming the premise alarm system, the employee will walk around premise to look of signs of intruders or forced entry. The employee will pay special attention to rest rooms, offices, and other areas where an intruder may hide. If an intruder is suspected, or a sign of forced entry is noticed, the employee will immediately leave the facility and call police and then call the company's security department.

After checking the interior of the facility the inside employee will post the predetermined all clear signal. The signal must remain visible until all scheduled employees have reported for the day.

Safe and vaults should be disarmed at the latest practical time. If an employee is threatened while disarming the vault he/she will enter a duress code into the alarm system keypad.

The front door will remain locked until opening time.

Before opening for business, all camera views will be checked to make sure cameras are aimed properly. The DVR will also be checked to verify that it is recording. Any problems with the cameras or DVR will be reported to the security department immediately.

### **Closing Procedure**

At closing time, one employee will lock the customer entry door(s) from inside. An employee will be stationed at the front door to let any customers remaining in the facility out one at a time.

Employees should take special notice of any customers that seem to be loitering or intentionally trying to be last in line. Anyone who seems to be intentionally loitering should be reported to the manager.

No customers will be admitted after the doors have been locked. Any employees attempting to gain entrance must show proper identification. No vendors or service technicians will be allowed access unless they have been given prior authorization.

After the final customer has left, and the front door has been locked, one employee will conduct an initial walk-through of the area. Special attention will be paid to restrooms, closets, employee lounge, storage rooms and any areas where individuals may be hiding.

One employee will be designated to conduct a final walk through of the premises before final closing. At this time, the employee will confirm that all cash, negotiable items and valuables have been properly stored and that all safes and cabinets have been locked. The alarm system controlling the safes and vaults will be armed at this time.

Prior to leaving, all lights should be turned off, except for those lights which will allow the lobby to remain visible from the street after hours.

Two or more employees will remain in the facility until final closing. Before leaving, one employee shall arm the premise alarm system and verify that the employee exit door is locked from outside.

## EXERCISE

Visit a store (Hyper market/discount store/specialty store) and observe the store procedures and understand their modus operandi then write down their operation procedures, its pros & cons and suggest how it can be more effective.

### A. Fill in the blanks.

1. Standard operating procedure is a set of \_\_\_\_\_ that document a routine or repetitive activity followed by an organization. (written instructions)
2. \_\_\_\_\_ minimize the variation and promotes \_\_\_\_\_ through consistent \_\_\_\_\_ of a process or procedures within the organisation. (standard operating system, standardization, implementation)
3. Inventory management procedure pertains to the \_\_\_\_\_ in a store. (Handling of products)
4. \_\_\_\_\_ allows goods to be purchased by instalments. (lay-by)
5. Retailers use \_\_\_\_\_ to draw customers into the store and entice them to purchase goods and services. (marketing strategy)

### B. True/False

1. Standard operating procedure typically covers all activities in the store. (T)
2. A standard operating procedure does not minimize the variation. (F)
3. Inventory management procedures pertain to handling of product. (F)
4. Employees are never a large expense for retailers. (F)
5. In a retail environment opening and closing times present unique security risks. (T)



## CHECKLIST FOR ASSESSMENT ACTIVITY

Use the following checklist to see if you have met all the requirements for Assessment Activity.

### Part A

- ✦ What is standard operating procedures.
- ✦ Discuss opening and closing procedure.

### Part B

- ✦ Describe standard operating procedures.
- ✦ Discuss store procedures in regard to exchange and return.

### Part C

#### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to identify store's standard operating procedure.		
Able to follow store's exchange and return procedure.		

## Session 4: Store Maintenance

### Relevant Knowledge

With customers changing needs and growing demand for retail outlet and chains, maintenance is becoming important issue for retailers. The retailers can check the products entered into the retail store and arrange products in an appropriate place. Categorize the products into different segments and put the products as per nature. Then the retailer maintain the proper sale of products and billing and bagging of products.

### Main Points for Maintenance of Stores

- ✦ Retail store maintenance management that helps in keeping facilities maintenance and repair cost on track.
- ✦ Emergency services should be available 24 hours a day, 365 days a year.
- ✦ Store history should be identify problem areas is part of preventive maintenance software.

- ✦ Store maintenance reporting solutions customized to meet customer's needs.
- ✦ Fixture installations and National roll outs on time.
- ✦ Cost effective preventive maintenance programs, fire extinguishers and yearly inspection tracking should be programmed.
- ✦ Open invoicing; its open procedures for vendors to insure that they are getting an honest price.
- ✦ Have access to qualified facilitators for retail store maintenance.
- ✦ The ability to resolve maintenance problem through communications, your locations and our contractors.

Store Maintenance provides all of the management services & maintenance trades that is needed in a retail environment. Retail maintenance is a very specialized field. To maintain a store is not a one man task. For this, retailer requires help of maintenance company.

Following working process of maintenance management solution:

- ✦ 100% Web-Based Application requiring no installation on client machines
- ✦ The Service Requester allows members to request maintenance using their web browser
- ✦ Technicians can be paged and assigned work
- ✦ Work History is stored and recorded for each location and asset
- ✦ Easy to set up Preventive Maintenance schedules
- ✦ Open architecture with easy integration to other applications
- ✦ Built using standard Microsoft Web Technologies

Maintenance connection provides a full-featured maintenance management solution that runs entirely inside your Internet browser. This allows you to get up and running quickly – without having to install anything on client machines. You can focus on what you do best rather than having to maintain maintenance software. Employees, contractors, requesters and management can access Maintenance Connection from wherever they are using an Internet browser. Organizations with multiple sites can easily keep their maintenance records in one place.

With the growing demand for retail outlets and chains, the maintenance management system of these buildings is becoming increasingly important. In order to maintain a clean street appeal and a 100% operational facility, it is important to have software to



help manage maintenance. As your chain of stores grows, you can expand the asset hierarchy and develop reports of how much was spent on any given store or group of stores over a period of time. Use the Service Requester to allow those working within stores to request maintenance at their location. The software can store an unlimited number of service vendors that you can then search for and contact to resolve maintenance issues.

Using Maintenance provider service is simple, easy-to-use web-based application can help to retail chain track maintenance costs, prevent and predict equipment failures, improve labor productivity, reduce costly downtimes, minimize investments in inventory, and lower the total cost of maintenance.

Retail stores can set up maintenance management system complete with preventive maintenance schedules for facilities and equipment such as the following:

Multiple Locations (chains)	HVAC Units	Signs
Flooring	Pipes	Elevators
Ceiling Fans	Computers	POS Machines
Windows and Glass	Carpet	Wood Flooring
Ceramic	Tile Lighting	Exterior Finish

## EXERCISE

Visit a store (Discount/Speciality/Super market). Observe the methods or procedures of store maintenance and what are the main points to be considered while maintaining a store. Write about store maintenance procedures or method of two stores and compare between two (either similar nature store or different).

Compile your report by exploring pros and cons in their procedures and suggest the practical approach in maintaining store.

### A. Fill in the blanks

1. Grainger delivers thousands of items to \_\_\_\_\_ quickly and reliably. (multiple locations)
2. Store \_\_\_\_\_ reporting solutions customised to meet needs of the customers. (maintenance)
3. The ability to resolve maintenance problem through \_\_\_\_\_. (communication)

## B. True/False

1. Open invoicing is a open procedure for vendors to ensure that they are getting honest price. (T)
2. Store history to identify problem area is a part of preventive maintenance software. (T)
3. Work history is stored and recorded not for each location and asset. (F)

## CHECKLIST FOR ASSESSMENT ACTIVITY

### Part A

- ★ Discuss store maintenance.
- ★ Describe points to be considered while maintaining store.

### Part B

- ★ Discuss store maintenance procedure followed by different store types.
- ★ Discuss their main focus points in store maintenance.

### Part C

#### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to identify major points in store maintenance.		



## Unit-3: Merchandise Planning

Unit Code: RS-202 NQ-2012	Unit Title: Merchandise Planning			
Location: Classrooms, Retail Shop or merchandise Store	Duration: 15 hours			
	Session – 1: Kinds of Merchandise			
	Learning Outcome	Knowledge Evaluation	Performance Evaluation	Teaching and Training Method
	1. Be acquainted with terms and concepts of Merchandise	1. Concept of Merchandise 2. The functions of merchandise 3. Planning of merchandising	1. Identify the steps in Merchandise and its planning 2. List out the functions of the merchandise 3. Make it clear the planning process of merchandising	<b>Interactive lecture:</b> Introduction to merchandise planning <b>Activity:</b> Visit to a retail shop or departmental store for identification of various types of merchandising and its planning
	2. List out the rights and guidelines of merchandising	1. Types of rights 2. Tips in merchandising	1. List out tips for better merchandising 2. Scrutinize the rights of merchandising	<b>Interactive lecture:</b> Merchandising rights and about their guidelines <b>Assignment:</b> Group discussion on various Acts and Laws regarding to merchandise and used various Reference Books.
	3. Identify the kinds of merchandising	1. Types of General Merchandise	1. Identify various types of merchandising 2. Distinguish between different kinds of merchandising	<b>Interactive lecture:</b> Various merchandiser and tell the students to recognize the type of merchandise <b>Pragmatic work:</b> Assign the work to the students like make a project on any one type of merchandise. It's threats and opportunities.



Session – 2: Role and Functions of Junior Merchandiser				
	1. Identify the role and functions of junior merchandiser	1. The Role of junior Merchandiser and their general functions 2. Describe the various merchandise presentations	1. Analyze the role of the junior merchandiser 2. Identify the general functions of junior merchandiser <ol style="list-style-type: none"> <li>Read product labels</li> <li>Weigh goods for counter sales</li> <li>record customer details</li> <li>Place the goods in proper way</li> </ol>	<b>Interactive lecture:</b> Highlight the role and functions of junior merchandisers <b>Activity:</b> Visit to various merchandise stores and observe the role and their general functions of junior merchandisers. <b>Group Discussion:</b> On the role of junior merchandisers.
	2. Apply the functions of the junior merchandisers at different level	1. General functions of merchandiser 2. Functions of administration merchandiser 3. Basic duties of the merchandiser 4. Functions at different levels 5. Functions of Divisional merchandise manager	1. Enumerate the general functions of merchandiser 2. Elaborate administration functions of merchandiser 3. List out the basic duties of merchandiser 4. Scrutinize the functions of merchandiser at different level 5. Identify the functions of Divisional merchandise manager	<b>Interactive lecture:</b> Invite the Divisional merchandise manager to solve the queries of the students at practical base. <b>Activity:</b> Visit to merchandise stores and observe the functions of admin level and observe the work of Divisional merchandise manager <b>Role play:</b> Play act in the classroom as various merchandiser and tell the students to recognize the type of merchandiser.
Session 3: Visual Merchandising and Display				
	1. Identify the basic aspects of visual merchandising	1. Meaning of visual Merchandising 2. Aspects of visual Merchandising 3. Elements of visual merchandising	1. Identify the elements of visual Merchandising 2. Find out the various aspects of visual Merchandising	<b>Interactive Lecture:</b> On visual Merchandising and PPT with interactive session <b>Activity:</b> Visit in various

				merchandise stores for observation of visual merchandise and find out the window display
	2. List out the functions, principles and techniques of visual merchandising	1. Functions of visual Merchandiser 2. Principles of visual Merchandising 3. Techniques of visual Merchandising 4. Types of visual Merchandising	1. Describe the functions of visual Merchandising 2. List out the principles of visual Merchandising 3. Identify the techniques of visual Merchandising 4. Spot out the types of visual Merchandising	<b>Interactive Lecture:</b> On visual merchandise <b>Activity:</b> Visit in various merchandise stores for observation and find out the functions of visual merchandiser at work-place
	3. Evaluate the impact of display of merchandise	1. Describe the factors (mannequins and alternatives fixtures, props displays & signage, planograms and store views, etc.) responsible for better visual display of merchandise	1. Differentiate between the various elements of display 2. Design window displays and visual presentations with an understanding of target consumer	<b>Interactive lecture:</b> Evaluation of Impact of Display of Merchandise
				<b>Activity:</b> Visit to two retail stores to compare the display of merchandise
	<b>Session 4: Duties and Responsibilities of Junior Merchandiser</b>			
	1. Describe the duties and responsibilities of Junior Merchandiser	1. Describe the various career opportunities within the retail industry 2. Describe the purpose of knowing job descriptions and responsibilities 3. Describe the employee and employer rights and responsibilities in retail industry 4. Describe the duties of Junior Merchandiser in a retail store	1. Demonstrate the knowledge of core competencies of a Junior Merchandiser	<b>Interactive lecture:</b> Role and Responsibility of Junior Merchandiser <b>Activity:</b> Visit to retail store to study the role and functions of Junior Merchandiser



		5. Describe the role of Junior Merchandiser in business promotion		
	2. Plan and prepare display of products	1. Describe the purpose of display of products 2. Describe the standards that the display should meet	1. Identify the equipment, materials, merchandise and props used for creating and installing the display 2. Demonstrate how to prepare the display area and put the display together in a way that causes the least inconvenience to customers 3. Demonstrate the knowledge of checking that the assembled display conforms to company's requirements and standards 4. Demonstrate the knowledge of keeping up-to-date record of displays.	<b>Interactive lecture:</b> Planning for merchandise display <b>Activity:</b> Visit to Retail Stores to understand how displays should conform to the company's requirements and standards.

## Introduction

A product or merchandise is anything that can be offered to a market or to the customer that might satisfy a need or a want. The functions of procurement of merchandise are integral to the retail organisation and these functions revolve round planning and control. Planning is of great importance because it take time to buy merchandise have it delivered, record the delivery in the company's records and then, to send the merchandise to the right stores.

The person who is to take the buying decision for a retail organisation must be aware of the consumer need and wants. An understanding of the consumer buying process is necessary. Also a clear understanding is necessary of what products are actually selling and where. This information can be obtained from sales record.

The sales staff offers valuable information about why a particular product is selling and why it is not. External sources of information like surveys conducted, magazines and trade publication and association are other sources of information.

This information gathered is analyzed and is basis for sales forecast.

**Merchandising** is any practice which contributes to the sale of products to a retail consumer. At a retail in-store level, merchandising refers to the variety of products available for sale and the display of those products in such a way that it stimulates interest and attracts customers to make a purchase.

Merchandise Planning then is "A systematic approach. It is aimed at maximizing return on investment, through planning sales and inventory in order to increase profitability. It does this by maximizing sales potential and minimizing losses from mark - downs and stock - outs."

It means Merchandise Planning is useful to the organizer for attracting customers, increase sales, profit maximization and reducing expenses.

## **Session 1: Kinds of Merchandise**

### **Relevant Knowledge**

Every retail organization, regardless of its size, will have a merchandise reporting hierarchy. It is important for the organizational structure of the buying office of the company. It guides about the customers that whom to call on and how. At its middle to lower levels it enables in categorizing and grouping of products for effective store display of merchandise and comprehensive analysis of sales data.

A typical customer will locate the type of retailer they wish to shop at based on their specific social, cultural, economical and demographic characteristics. Discounter, Specialty Store, Supermarket, Hypermarket, etc.

### **Kinds of Merchandise**

There are various types of Merchandise which can be purchase by the ultimate users for their daily needs.

It includes following types of products:

1. Consumer products:



- a) Staple: used for daily needs e.g. bread, milk, grocery etc.
- b) Impulse: instant purchasing e.g. chocolates
- c) Emergency: purchase on the needs e.g. Medicine
- d) Convenient: conveniently purchased e.g. vegetables
- e) Luxury: costly products e.g. Car, jewelry
- f) Comforts: purchase for comforts e.g. sofa-set



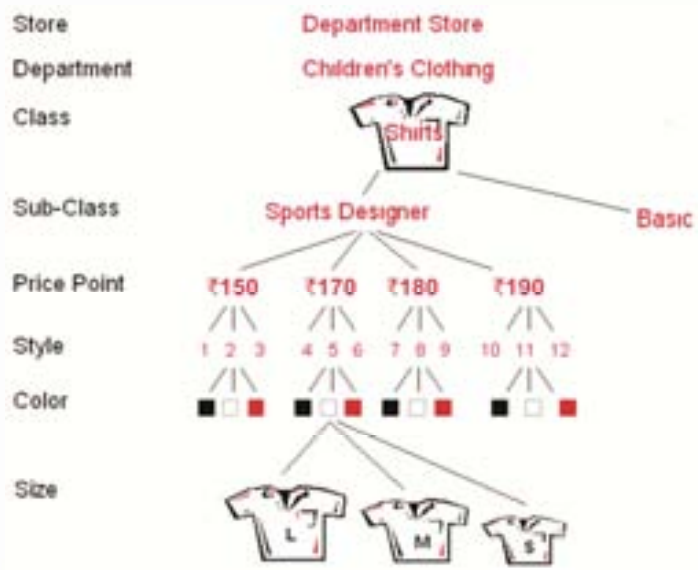
2. Industrial: used by the industry e.g. Raw material, machines

★ **DEPARTMENT** – At the entry point in the store, the customer will locate the specific department of merchandise desired. Men's, Women's, Junior Fashions, Food Court, Games Zone, Spa etc.

★ **CLASS**-- Within the specific area the customer looks for the class of merchandise desired. Blouses or Shirts, Pants, Dresses, etc.

★ **SUBCLASS**-- The next lower level that further segments merchandise types is subclass. This level will likely separate like kinds of merchandise based on the differing features each type has. E.g. Sports Designer shirts have a printed or appliqué logo on them, whereas Basic shirts have nothing.

★ **PRICE**-- Within the subclass the customer will look further to find the price according to their economy class or that fits into their budget.



- ✦ **STYLE--** Once the appropriate price point has been chosen, the customer will find the style within that price point that will satisfy their need. For e.g. fashionable cloths, style of hair etc. This style will have been assigned a specific number by the retailer.
- ✦ **COLOR AND SIZE--** The lowest levels in the hierarchy are where this customer will ultimately find what they are looking for. These levels are defined at the color, shape and finally, the size of the products, the customer requires.

There are six types of rights of merchandising:

- ✦ Type
- ✦ Quality
- ✦ Price
- ✦ Quantity
- ✦ Time
- ✦ Place

The steps to determine right assortment of merchandise are

- ✦ Assessing the target market
- ✦ Collecting information
- ✦ Analysing the data
- ✦ Determining breadth and depth of merchandise offerings.

### Merchandising Tips

- ✦ The merchandiser must source products according to the latest trends and season.
- ✦ The merchandise should be as per the age, sex and taste of the target market.
- ✦ Merchandise for children should be in line with cartoon characters (like Barbie, Pokemon etc) to excite them.

Select the proper types of General Merchandise Retailers

- ✦ Discount Stores
- ✦ Specialty Stores



- ✦ Category Specialists
- ✦ Home Improvement Centres
- ✦ Department Stores
- ✦ Drugstores
- ✦ Off-Price retailers
- ✦ Value Retailers

## EXERCISE

Visit a mall and list out the various merchandise in a store and classify them into

1. Class
2. Subclass
3. Price
4. Size
5. Colour

## ASSESSMENT

### A. Fill in the blanks

1. \_\_\_\_\_ is important for the organizational structure of the buying office of the company. (Merchandise)
2. The display of the merchandise plays an important role in attracting the \_\_\_\_\_ (customers)
3. Every retail organization, regardless of its size, will have a merchandise reporting \_\_\_\_\_ (hierarchy)
4. \_\_\_\_\_ level will likely separate like kinds of merchandise based on the differing features. (Subclass)
5. The merchandiser must source products according to the latest \_\_\_\_\_ and \_\_\_\_\_ (trends, season)

### B. Multiple Choice Questions

Tick the correct answer

1. Following is not a type of General Merchandise Retailers
  - a) Discount Stores



- b) Specialty Stores
  - c) Category Specialists
  - d) Public limited company
2. \_\_\_\_\_ is a type of rights of merchandising
- a) Market
  - b) Environment
  - c) Quantity
  - d) Warehouse
3. In the men apparel the following subclass does not exist.
- a) Skirts
  - b) Shirts, Pants
  - c) Pajama
  - d) Kurta
4. \_\_\_\_\_ is not factor of Merchandise Planning
- a) Attracting customer
  - b) Increase sales
  - c) Profit maximization
  - d) Standardization

**C. True or False**

- 1. At the entry point in the store, the customer will locate the specific department of merchandise desired. (T)
- 2. Within the subclass the customer will look further to find the price according to their economy class or that fits into their budget. (T)
- 3. The merchandiser is responsible for particular lines of stocks. (F)
- 4. Merchandise Planning is useful to the customers for purchasing. (F)

**CHECKLIST FOR ASSESSMENT ACTIVITY**

(Use the following checklist to see if you've met all the requirements for Assessment Activity.)



## Part A

- ★ Define a) Merchandise b) Merchandise planning
- ★ List out the rights of merchandising
- ★ Give steps to determine right assortment of merchandise.
- ★ Name the types of general merchandise retailers
- ★ Mention the tips followed by merchandiser
- ★ Explain the various types of merchandise

## Part B

Discussed in class the following:

- ★ Differentiate between the general merchandising and administrative merchandising

## Part C

### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to list out the rights of junior merchandiser		
Able to explain the steps to determine right assortment of merchandise.		

## Session 2: Role and Functions of Junior Merchandiser

### Relevant Knowledge

There are various types of Merchandisers included in the business world like junior merchandiser, senior merchandiser, executive functions of merchandising are to find, solicit, select, and develop products to be sold. Beyond this, it receives and tags samples, interacts



Senior Merchandiser



Junior Merchandiser

with vendors, finalizes relevant product information, develops item packaging, evaluates and approves each phase of creative production, forecasts inventory, and analyzes performance results by product and category.

The basic **functions** of merchandise planning are:

- ✦ Retail Merchandising refers to the various activities which contribute to the sale of products to the consumers for their end use.
- ✦ Every retail store has its own line of merchandise to offer to the customers.
- ✦ The display of the merchandise plays an important role in attracting customers into the store and prompting them to purchase as well.
- ✦ Merchandising helps in the attractive display of the products at the store in order to increase their sale and generate revenues for the retail store.
- ✦ Merchandising helps in the sensible presentation of the products available for sale to entice the customers and make them a brand loyalist.

The merchandiser is responsible for particular lines of merchandise. For example, in a department store, there may be merchandisers for menswear, women's wear and children's wear etc. the basic duties of the merchandiser can be divided into four areas: planning, directing, coordinating and controlling

The main functions of a junior merchandiser are:

- ✦ Managing site and location
- ✦ Managing the operative process at the stores
- ✦ Managing customer service
- ✦ Managing Cash and stock
- ✦ Managing store facilities
- ✦ Managing security
- ✦ Managing personnel
- ✦ Crisis management
- ✦ IT management

## Functions

At suppliers level: Visits to suppliers or manufacturers of select goods, they negotiate a price, order the goods, agree on a delivery date, complete all the necessary paperwork, and keep in touch with suppliers to make sure that the goods arrive on time.



At visual display staff and department manager's level: To decide how goods should be displayed to best attract customers' attention. This might involve planning and setting up sales promotions and advertising campaign.

At finance level: Actually check the response to various items in the merchandise, to enjoy working as a merchandiser, it is essential that the individual has a mathematical ability to work out budgets and understand sales figures.

At Divisional Merchandise Manager's level: The person would be responsible for merchandising activities for particular lines of merchandise. For example, the children's wear DMM supervises those buyers who purchase merchandise such as baby clothes, clothes for new born, clothes for boys, clothes for girls and accessories.

Typically, the role of a Divisional Merchandise Manager, immaterial of the size of the retail organization, would involve the following functions:

1. Forecasting sales for the forthcoming budget period:
2. Translating the sales forecast into inventory levels in terms of rupees.
3. Inspiring commitment and performance on the part of the merchandisers and buyers.
4. Assessing not only the merchandise performance but also the buyer's performance in order to provide control and maintain high performance results.



## EXERCISE

1. Visit to an any Mall to observe the functions of merchandisers at different levels

a) At suppliers level

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b) At visual display staff and department manager's level

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c) At finance level

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d) At Divisional Merchandise Manager's level

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### A. Multiple choice questions

1. \_\_\_\_\_ is not a type of Merchandisers included in the business world

- a) Junior merchandiser
- b) Senior merchandiser
- c) Executive merchandiser
- d) Finance manager

2. The main function of admin merchandiser is:

- a) Managing site and location
- b) Assembling



- c) Transportation
  - d) Leadership
3. The person would be responsible for merchandising activities for particular lines of merchandise.
- a) Finance Manager
  - b) Production Manager
  - c) Personnel Manager
  - d) Divisional Merchandise Manager
4. At suppliers level merchandisers function \_\_\_\_\_ is not included
- a) Visits to suppliers of select goods
  - b) Negotiate a price
  - c) Order the goods
  - d) Make payments

**B. Fill in the blanks**

- 1. Buying performance may be \_\_\_\_\_ on the basis of net sales (Evaluated)
- 2. \_\_\_\_\_ is very important function of merchandiser that he will guide and train buyers as and when the need arises. (Directing)
- 3. \_\_\_\_\_ is not only the merchandise performance, but also the buyer's performance as well as buying behaviour is part of the merchandise manager's job. (Assessing)
- 4. The basic duties of the merchandiser can be divided into four areas:  
\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_  
(planning, directing, co-coordinating and controlling)

**CHECKLIST FOR ASSESSMENT ACTIVITY**

(Use the following checklist to see if you've met all the requirements for Assessment Activity.)

**Part A**

- 1. Explain the general functions of merchandising.

2. Explain the functions of junior merchandiser at administrative level.
3. State basic duties of junior merchandiser.
4. What role is played by junior merchandising manager.

### Part B

In the following table fill up the functions performed by Junior Merchandiser:

Tasks to be done before the store opens	Tasks to be done regularly through the day	Tasks to be done after the store closes

### Part C

#### Performance Standards

The performance standard may include, but not limited to:

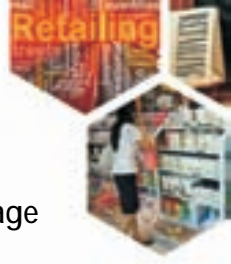
Performance Standards	Yes	No
Able to list out the administrative and general functions of junior merchandiser.		
Able to find out the main functions of the junior merchandiser.		

## Session 3: Visual Merchandising and Display

### Relevant Knowledge

Visual merchandising is the activity and profession of developing floor plans and two and three-dimensional displays in order to maximise sales. It is the creation of an attractive visual image to induce the customers to buy from a certain retail outlet. Sometimes, it is mistaken to be the same as window display, but in fact, window





display is only a very small part of visual merchandising. It deals with the entire image presented by the retail outlet to the customer.



It includes several aspects such as

- ✦ the flooring and lighting used in the store,
- ✦ the colour co-ordination in the store,
- ✦ uniforms of the staff,
- ✦ the way in which the staff interacts with the customers,
- ✦ the design of the trial rooms

In short, everything that creates an image about the store in the mind of the customer. More and more retailers understand the importance of visual merchandising in augmenting sales and are indulging in it. Visual merchandising is being considered as an investment and not as an expense.

Visual merchandising is the art of displaying merchandise in a store to attract customers and increase sales. A passion for design and creativity are essential for becoming a visual merchandiser. The purpose of such visual merchandising is to attract, engage and motivate the customer towards making a purchase. Visual merchandising commonly occurs in retail spaces such as retail stores and trade shows.

### Functions of the Visual Merchandiser

1. A Visual Merchandiser takes care of the window display representing a seasonal theme with mannequins the arrangement of merchandise according to concepts and stories.
2. He decorates the window display in such a way that the customer gets excited by the brand and increases the walk-ins.
3. A Visual Merchandiser also spends a lot of time training the store staff on how to place merchandise.



4. He also trains the staff to follow instruction manuals and advises them on what should go on the rack and be displayed on the floor,
5. He sets the colour scheme of the floor.
6. He takes a call on slow-moving merchandise and makes sure it gets prominence through better lighting and display.

## Principles

The principles of visual merchandising are:

- ★ Make it easier for the customer to locate the desired category and merchandise.
- ★ Make it easier for the customer to self-select.
- ★ Make it possible for the shopper to co-ordinate and accessorize.
- ★ Recommend, highlight and demonstrate particular products at strategic locations.
- ★ Educate the customer about the product in an effective & creative way.
- ★ Make proper arrangements in such a way to increase the sale of unsought goods.

## Techniques

Visual merchandising builds upon or augments the retail design of a store. It is one of the final stages in setting out a store in a way customers find attractive and appealing.

Many elements can be used by visual merchandisers in creating displays including color, lighting, space, product information, sensory inputs (such as smell, touch, and sound), as well as technologies such as digital displays and interactive installations.

A planogram allows visual merchandisers to plan the arrangement of merchandise by style, type, size, price or some other category. It also enables a chain of stores to have the same merchandise displayed in a coherent and similar manner across the chain.

## Types of Visual Merchandising

### Window Displays

Window displays can communicate style, content, and price. Display windows may also be used to advertise seasonal sales or inform passers-by of other current promotions.





3. Visual merchandising commonly occurs in retail spaces such as \_\_\_\_\_ and \_\_\_\_\_. (retail stores, trade shows)
4. \_\_\_\_\_ make proper arrangements in such a way to increase the sale of unsought goods. (Visual Merchandiser)
5. A \_\_\_\_\_ allows visual merchandisers to plan the arrangement of merchandise by style, type, size, price or some other category. (planogram)

**B. Multiple choice questions----**

1. A Visual Merchandiser takes care of the \_\_\_\_\_ representing a seasonal theme.
  - a) Window display
  - b) Customers
  - c) Suppliers
  - d) Agents
2. Following element can be used by visual merchandisers in creating displays.
  - a) Package
  - b) Lighting
  - c) Baskets
  - d) Trolleys
3. Food merchandising does not consist of
  - a) Restaurants,
  - b) Grocery stores,
  - c) Ice-cream Parlor
  - d) Footwear
4. \_\_\_\_\_ may also be used to advertise seasonal sales or inform passers-by of other current promotions.
  - a) Newspaper
  - b) Radio
  - c) Display windows
  - d) Theater



## CHECKLIST FOR ASSESSMENT ACTIVITY

(Use the following checklist to see if you've met all the requirements for Assessment Activity.)

### Part A

1. What is visual Merchandising?
2. What is the difference between visual merchandising and window display?
3. What are the functions of Visual Merchandiser?
4. State the principles of Visual Merchandising
5. Describe the techniques of Visual Merchandising

### Part B

Discuss in class the following:

- ★ Differentiate between the visual merchandising and window display.

### Part C

#### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to differentiate between the visual merchandising and window display.		
Able to list out the functions of visual Merchandiser.		
Able to identify the techniques of Visual Merchandising.		

## Session 4: Duties and Responsibilities of Junior Merchandiser

### Relevant Knowledge

The merchandiser is responsible for particular lines of merchandise. For example, in a department store, there may be merchandisers for menswear, women's wear, children's wear etc. The basic duties of the merchandiser can be divided into four areas: planning, directing, co-coordinating and controlling.

## Planning

Though the merchandisers may not be directly involved in the actual purchase of merchandise, they formulate the policies for the areas in which they are responsible.

## Directing

It is very important function of merchandiser that he will guide and train buyers as and when the need arises. Inspiring commitment and performance in the part of the buyers is necessary.

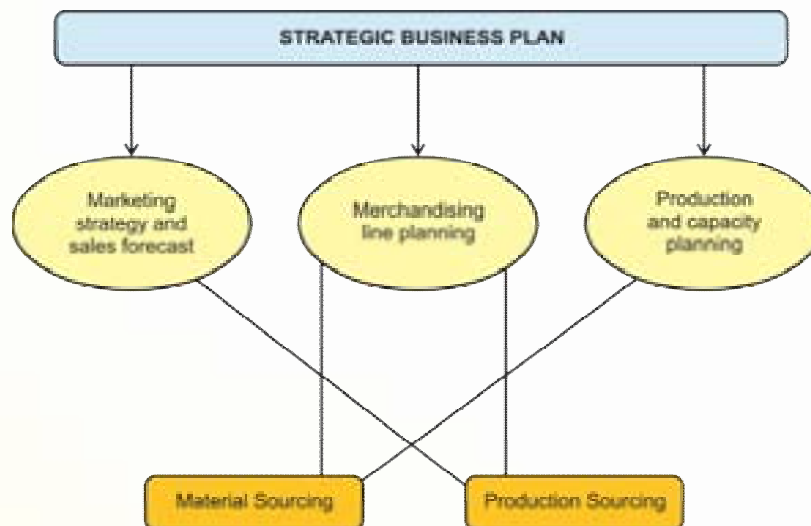
## Coordinating

Usually, merchandise managers supervise the work of more than one buyer; hence they need to coordinate the buying effort in terms of how well it fits in with the store image and with the other products being bought by other buyers.

## Controlling

Assessing not only the merchandise performance, but also the buyer's performance as well as buying behaviour is part of the merchandise manager's job. Buying performance may be evaluated on the basis of net sales maintained mark up percentages, mark down percentages, gross margin percentages and stock turn.

This is necessary to provide control and maintain high performance results.



Whether you plan to design your stores yourself, or you just want to better understand how to evaluate the effectiveness of your shopping environment and experience, this session will give you the foundation you need to achieve the fundamental goal of any store design or visual merchandising effort – to increase sales.



There are many things that Visual Merchandisers must look after to take care of customers and their emotions and they should easily attract toward the shop and buy the products. Many merchandisers takes training for these aspects that what they have to do in the shop and what way they don't create trouble for the customers.

### Responsibility to do the Things

- ★ Do buy or borrow folding tables, or make some from sawhorses and plywood.
- ★ Do group like items together. The goods look more abundant, and it makes for a better display. Customers shopping for a particular type of merchandise can find what they're looking for quickly, and they're more likely to buy multiple pieces.
- ★ Do dust or wash your merchandise as needed before setting it out. If they've been in storage, such as draperies, curtains and upholstered furniture
- ★ Do display valuable items close to your house or checkout area to keep an eye on them, especially if they're small or fragile.
- ★ Do place breakables on tables that are out of the reach of children. Some shoppers let their children run wild, and those who do will resist paying for that broken collection of carnival glass.
- ★ Do place desirable sale merchandise at the street end of your yard or driveway, especially seasonal items and large pieces, such as furniture. It makes the sale look bigger and better,
- ★ Do display adult and larger children's clothing on hangers, and arrange it by size. It presents better, and the clothing is less likely to end up crumpled on the ground. If it's on a table, many customers won't refold it after digging through the stacks.
- ★ Do displays baby clothing and young children's clothing on tables? Fold and stack it according to clothing type and size. It takes up less space, and the small pieces are easy to straighten and refold as needed.



*Mannequins showcasing the dress collection are fully supported by merchandise found adjacent to it, sharing the same colour story and similar styles.*

There was thousands of people downtown during the Pride Parade weekend. In keeping with this, the store showed their support while promoting their merchandise.



*Engage your customers and deliver an experience.*



*These sale signs maintain perceived product values.*



*This nice and enticing display upfront! It is effective in getting passers-by to come in as well. It is the brightest stores tend to attract the most customers lighting the entrance, especially the main focal display is sure to grab attention.*

### Responsibility to Not to Do the Things

- ✦ Don't go overboard cleaning and prepping the merchandise. You won't make enough money to recoup the time investment.
- ✦ Don't place your tables and clothing racks so close together that shoppers can't get through. Spread out across the driveway and yard. It makes your sale look bigger anyway.
- ✦ Don't deliberately set out merchandise that's been damaged beyond repair or recalled, and don't lie about the condition.
- ✦ It's fine to sell a nonworking vintage radio to someone who wants to repair or display it, but be honest about the condition.





- ★ Don't tell a shopper about functioning of the products, if it not.
- ★ A feature display such as the one shown on the mannequin sets an expectation that items similar to it can be found in adjacent units.

However, in this case, the adjacent racks show casual T-shirts. Where can one find similar dresses?



*In contrast, this store missed a great selling opportunity.*



*On the other hand, these signs greatly devalue the merchandise.*



Who turned off the lights? Lighting the entrance is crucial not only in getting attention but also in defining the start of the store experience.



## EXERCISE

If you are an owner of a super market how will you assess yourself with the following points? Justify

If you want to engage with shopping experience of your brand. What do your stores say about you? Do they engage the customer? Do they excite the customer? Do they assist the customer in finding what they're looking for quickly and easily? Is your store environment your best salesperson?

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### A. Fill in the blanks

1. Displays \_\_\_\_\_ and \_\_\_\_\_ clothing on tables. Fold and stack it according to clothing type and size. (baby clothing, young children's)
2. \_\_\_\_\_ the entrance is crucial not only in getting attention but also in defining the start of the store experience. (Lighting)
3. Clutter of the products in one rack, it signs greatly \_\_\_\_\_ the merchandise. (Devalue)
4. Engage your \_\_\_\_\_ and \_\_\_\_\_ an experience. (customers, deliver) Do place sale \_\_\_\_\_ sale \_\_\_\_\_ at the street end of your yard. (desirable, merchandise)

### B. True or False

1. Spread out across the driveway and yard. It makes your sale look bigger anyway. (T)
2. Do group like items different from each other category. (F)
3. Don't place your tables and clothing racks so close together that shoppers can't get through. (T)
4. Tell a shopper about functioning of the products, if it not. (F)
5. Mannequins showcasing the dress collection are fully supported by merchandise found adjacent to it. (T)



## CHECKLIST FOR ASSESSMENT ACTIVITY

(Use the following checklist to see if you've met all the requirements for Assessment Activity.)

### Part A

- ✦ Explain the duties of the Junior Merchandiser?
- ✦ What are the responsibilities to do the things?
- ✦ What are the responsibilities to not to do the things?

### Part B

Discussed in class the following:

- ✦ Differentiate between the duties and responsibilities of Junior Merchandiser.

### Part C

#### Performance Standards

The performance standard may include, but not limited to:

Performance Standards	Yes	No
Able to differentiate between the duties and responsibilities of Junior Merchandiser.		
Able to list out duties of the Junior Merchandiser.		
Able to identify the responsibilities to not to do the things.		

## Unit-4: Security Operations & Housekeeping in Retail

Unit Code: RS205- NQ2012	Unit Title: Security Operation & Housekeeping in Retail			
Location: Classrooms, Retail Shop or Departmental Store, Malls, Super Market	Duration: 15 hours			
	Session -1: Security Points in Retail Store			
	Learning Outcome	Knowledge Evaluation	Performance Evaluation	Teaching and Training Method
	1. Identify the various security points.	1. Purpose of security points in retail store. 2. State the locations of security points in retail store.	1. Enlist the various security points. 2. Identify the locations of the security points in retail stores. 3. Analyse the multi utility of security points in retail stores	<b>Interactive lecture:</b> Introduction of security points. <b>Activity:</b> 1. Visit a retail store and make the list of security check points. 2. Develop a block model of retail store. 3. Role play at security points.
	Session-2: Role and Functions of Security Personnel			
	1. Identify the role and functions of security/ personnel.	1. Role of security in retail store. 2. Functions of security in retail store.	1. Analyse the role of security in each department of retail store. 2. Analyse the functions of security in each department of retail store. 3. Differentiate the role and functions of security in different departments of retail store.	<b>Interactive lecture:</b> Knowing the role and function of security. <b>Activity:</b> Group discussion on advancement in security functions in retail store.
Session-3: Material Handling in House Keeping				
	1. Describe the competencies required for Material Handling in Housekeeping	1. Describe the competencies and skills required for Housekeeping	1. Measuring the Performance in Respect of Knowledge, Duties, Responsibilities and Accountability. 2. Identify suitable Competencies required for material	<b>Interactive lecture:</b> 1. Interaction and Exposure in Retail Housekeeping. 2. Teach the Practical Methods of Material Handling. 3. Practical Teaching of Advantages of Team



			handling in housekeeping.	<p>Work, Policies and procedures of health and safety.</p> <p><b>Activity:</b></p> <ol style="list-style-type: none"> <li>1. Visit a Mall or working place where housekeeping materials are handled in the Retail store &amp; learn from the experience of expert.</li> <li>1. Visit Retail Organization and interact regarding handling of housekeeping Materials, potential health hazards, handling of safety equipments.</li> </ol>
	2. Examine the process of Material Handling	1. Procedure to handle the material used in Retail Housekeeping	1. Measure the Outcome of How successfully the Material have been handled	<p><b>Interactive lecture:</b> Process of Material handling in Housekeeping.</p> <p><b>Activity:</b> Role plan on cleaning the store.</p>
	3. Identify and Operate housekeeping equipment in retail departmental stores	<ol style="list-style-type: none"> <li>1. The materials and equipments.</li> <li>2. Techniques of Housekeeping practices and protection of materials.</li> </ol>	<ol style="list-style-type: none"> <li>1. Measure the outcome or result after using the material.</li> <li>2. For cleanliness, safety, hygiene, hazardous and assess whether it is as per standards and procedures set by the retail industry</li> <li>3. Identify the equipment</li> <li>4. Operate the housekeeping equipment.</li> </ol>	<p><b>Interactive lectures:</b> Use of housekeeping equipments in retail industry.</p> <p><b>Activity:</b></p> <ol style="list-style-type: none"> <li>1. Role play on responsibilities of housekeeping work.</li> <li>2. Visit a Retail Mall and practically learn to operate housekeeping equipments.</li> </ol>
	<b>Session – 4: Procedure in Housekeeping</b>			
	1. Identify the Competencies required for housekeeping in retail operations	<ol style="list-style-type: none"> <li>1. To describe housekeeping in retail outlets, retail stores and retail malls.</li> <li>2. Competencies</li> </ol>	1. Identify the responsibilities taken, involvement in housekeeping and measure the cleanliness and waste	<p><b>Interactive Lecture:</b></p> <ol style="list-style-type: none"> <li>1. Competencies required for housekeeping in retail sector</li> <li>2. To learn in the class</li> </ol>

		required for housekeeping	recycling. 2. Identify the competencies 3. Operate the housekeeping activity with required competency	room the procedures and job opportunities in retail sector. <b>Activity:</b> 1. By role play the responsibilities and the functions of the housekeeping work in retail store. 2. To visit and experience the housekeeping method in the work place of retail sector
	2. Applying Housekeeping in the area of cleanliness, hygiene, safety, disposal of waste	1. Competencies required in cleanliness, hygiene, waste disposal, safety, health hazards.	1. Evaluate the roles, responsibilities and effectiveness of jobs and housekeeping. 2. Identify the methods for applying housekeeping work.	<b>Interactive Lecture:</b> On the job opportunities in retail housekeeping. <b>Activity:</b> Visit to a retail store and observe what kind of methods applying for housekeeping of retail store.

## Introduction

Private Security Agencies offer a wide range of services that include providing security to businessmen, industrialist and celebrities, accompanying consignments and cash, monitoring the movement of visitors at shopping malls, construction sites, etc. and helping the police. The person who was still very recently called a Watchman has evolved as a Private Security Guard or Private Security Officer. A Private Security Guard has to perform several functions, which include observing and monitoring people, access control, responding to security threat or emergency, and using appropriate methods to control illegal or unauthorized entry.



Security industry in India took the steep rise in early 90's when globalization took place in India. The Corporate sector and Multinational Companies created a huge demand of



security services. The private security sector in India is growing at the compound average growth rate of 25 per cent annually and generates more than 12 lakh jobs per annum.

Housekeeping refers to the set of activities that are intended for cleaning the house by cleaning dirty surfaces, dusting, disposing of rubbish, vacuuming, etc. Hoover the floor, change the sheets, and clean the windows. All of these activities come under the umbrella term 'housekeeping' and are what most people do a little of from time to time.



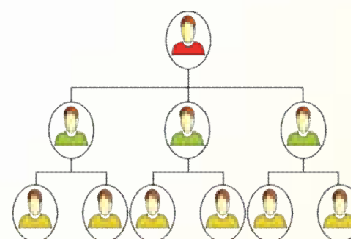
Housekeeping involves usage of various tools including brooms, sponges, vacuum cleaners, mops; along with cleaning products like bleaching agent, detergents, and disinfectants. The housekeeping is done not only to make the home look clean but also to make it more hygienic and safer to live in comfortably. A proper housekeeping prevents the growth of mould in wet areas, building of lime scales on taps, toilets stinking, accumulation of cobwebs and bacterial growth on garbage.

In this Unit, you will learn about the security points in retail store, role and functions of security personnel, material handling in housekeeping and procedures adopted in housekeeping in retail.

## Session 1: Security Points in Retail Store

### Relevant Knowledge

Private security generally covers security of Personnel, Property and Information. The primary aim of private security is to provide a safe and secure environment to the company and its personnel to carry out their duties. While the expectations of the people for security are immense, it is not practically feasible for the government to meet all the requirements. Also all security issues do not require police intervention and can be managed by private citizens if they are cognizable offences and crimes. The offences under the Indian Penal Code are classified as cognizable (a police officer may arrest without warrant) and non-cognizable offence (a police officer shall not arrest without warrant). Section 43 of the Criminal Procedure Code of India bestowed power of arrest to the common citizen if a cognizable and non-bailable offence is committed in his or her presence. The section 43 of IPC states "any private person may arrest or cause to be



arrested any person who in his presence commits a non-bailable and cognizable offence, or any proclaimed offender, and, without unnecessary delay, shall make over or cause to be made over any person so arrested to a police officer, or, in the absence of a police officer, take such person or cause him to be taken in custody to the nearest police station”.

## Security Points

The scope of private security in India does not include policing and law enforcement and is limited to ensuring protection and loss prevention through the following means:

- ★ **Prevention:** Starting from a simple lock, to boundary walls, gates and the security guards, they are all means of preventing loss and damage to personnel, property and information.
- ★ **Detection:** An intruder may overcome protective barriers but may still be thwarted in his/her plans by a detection and warning system that can alert the whole security apparatus.
- ★ **Interference:** Once an intrusion or breach is detected, immediate action is taken to interfere with the designs of the intruder and prevent him/her from executing his/her designs.
- ★ **Delay:** The stronger the security system, the greater is the delay caused to an intruder, thereby increasing the chances of detection.



Once the assets requiring protection and threats are known, a security plan is worked out. A successful security programme will rely on the honesty, integrity, and loyalty of the persons implementing the security system as well as its employees' responsiveness to the laid down procedures and systems.

## Job Roles and Duties

Security personnel protect the buildings, grounds, assets and occupants, including visitors assigned to them. The main job roles within the Private Security Organisation are Security Guard (Various Types), Security Supervisor, Security Officer, and Manager. A security guard is required to perform the following duties:



## Reception Duties

At the reception, the security guard has to perform the following duties:

- ✦ Ensure that all equipments are operational at the beginning of duty.
- ✦ Ensure that all visitors enter their particulars in the visitor book.
- ✦ Ensure that the badges and visitor slips are issued after checking with the visiting officer, if prior information is not available.
- ✦ Ensure that all documentation is available at the start of duty.
- ✦ Ensure that the documents are complete.
- ✦ Ensure that all visitors comply with the company rules and policies with regard to the use of the following:
  - a) Mobile telephone
  - b) Arms and ammunition
  - c) Laptop/pen drive
  - d) Cameras

## Gate Duties

A security guard on duty at the entrance to premises is the first point of contact for company, staff and visitors. The gate duties include the following:

- ✦ Ensure that all equipment is operational at start of duty.
- ✦ Ensure that all documentation is available at start of duty.
- ✦ Stop vehicles entering and exiting.
- ✦ Stop personnel entering and exiting.
- ✦ Search vehicles entering and exiting.
- ✦ Search personnel entering and exiting.
- ✦ Record all incidents of stop and search.
- ✦ Ensure that all documentation is completed as soon as possible.

## Material Handling

A security guard on duty at the in/out material handling in the organization has to perform the following duties:



- ✦ Ensure that all equipment is operational at start of duty.
- ✦ Ensure that all documentation is available at start of duty.
- ✦ Stop personnel and vehicles entering and exiting.
- ✦ Record all incidents of stop and search.
- ✦ Ensure that the materials are as per the purchase order and challan/invoice.
- ✦ Outgoing material is allowed only after authentication of the authorized signatory.
- ✦ Ensure that all documentation pertaining to incoming/outgoing material is completed as soon as practicable.
- ✦ Maintain separate registers for returnable material.
- ✦ When conducting searches of vehicles or bags get the driver or owner to conduct the physical aspects of the actual search.

## Patrolling

The patrolling of premises is one of the most important duties performed by the security personnel. The security patrol falls into two main groups:

- ✦ Mobile Patrol
- ✦ Static Assignment Patrol

### Mobile Patrols

- ✦ The security personnel on patrol is one of the most important elements of any security system.
- ✦ Mobile patrol visits are carried out on a client's property at irregular intervals.
- ✦ The patrol may entail a check of the perimeter of premises or may require a comprehensive internal investigation.
- ✦ The number of visits per shift may have to be agreed with the client.



### Static Assignment Patrol

- ✦ Patrols on a static site are usually undertaken on a constant basis, checking both internally and externally.
- ✦ Alertness, interest and thoroughness are some of the essential qualities of an effective static security guard.



## Control Room Duties

A Control Room is a room serving as an operations centre where a facility or service can be monitored and controlled. A definition or description of a control room for security would be “a facility for the provision or procurement of assistance or advice for guarding, mobile patrol and mobile supervisory staff in routine and emergency situations”. The function and duties of a controller therefore would be to provide for the following:

- ✦ Effective monitoring of guards, patrolmen and mobile supervisory staff by strict observance of rules for proper documentation, telephone, radio or other communication procedures.
- ✦ Recording of all appropriate routine and emergency matters to enable management to deal quickly and efficiently with the company’s contractual responsibilities.
- ✦ Maintaining a register of all keys held in the facility.
- ✦ Ensure proper surveillance through CCTV.

A copy of security manual or Standard Operating Procedures (SOPs) and assignment instructions must be available within the control room at all times. Records of all incidents reported should contain the following details:

- ✦ Date, time and place of the incident.
- ✦ Date and time of reporting and by whom it was reported.
- ✦ Nature of the incident.
- ✦ Action taken, including onward reporting.
- ✦ Action to be taken.
- ✦ Names and addresses of all relevant persons present.

## Assignment Instructions

An important aspect in the execution of the security tasks is that every individual must be aware of his/her duties for which written instructions must exist. They indicate what the security personnel should do on the assignment, where to go, how to respond to different situations, patrol routes and timings, lines of communication, comprehensive

details of the assignment, precise instruction in respect of responsibility and accountability, working hours and handing/taking over procedures.

Assignment instructions are the duties and responsibilities of the security staff as agreed with assignment management and will also include the following:

- ✦ **Internal Organization Chart:** It will give the security guard necessary information as to who is who in the organization. It also gives information in respect of the location of their offices so that when patrolling the premises, adequate attention can be paid to them as required. An internal telephone directory should also be included.
- ✦ **Company's Safety Statement:** The statement ensures that the security staff is aware of all hazards in respect of safety, health and welfare at work and the management plans for dealing with various types of hazards. The safety statement is also beneficial to contractors and other persons working on the premises. They should be aware of the hazards at workplace and the procedures to overcome them.
- ✦ **Standing Instructions:** These include day-to-day working and procedural requirements.
- ✦ **Emergency Plan:** The plan describes the action to be taken in the event of a serious incident such as fire or a disaster, a bomb threat, evacuation of the building, armed robbery or other serious threats to the assignment.
- ✦ **Evacuation Instructions:** These are the instructions that indicate action to be taken in the event of emergencies. Location of assembly points, name and location of fire warden, list of members of emergency response team and other persons.
- ✦ **Name and Address of Key Personnel:** It includes the details of the senior personnel so that in the event of an operational incident or a major incident they can be contacted and informed as to the extent of the incident. In such events they may either advise the security personnel on what action to take or opt for attending the incident personally. Telephone numbers of these personnel, including their home phone number, mobile telephone numbers and any other numbers necessary to contact them.

In addition to the assignment instructions, most security supervisors issue post instructions to the guards that are specific to the post assigned to the individual. The Security Guards carry these post instructions in their shirt pockets at all times.



## Responding to Emergencies

Security personnel are expected to react to emergency situations and to reduce the impact caused by an emergency event at a worksite. The training of security personnel should include the following:

- ✦ Monitoring alarm systems and assessing need for response and follow-up.
- ✦ Responding to an emergency alarm.
- ✦ Communicating details of incident.
- ✦ Emergency scene isolation.
- ✦ Managing emergency situations.

Go to any mall, office, factory or institution, and the first thing that catches your eye are the Security Guards. They stand out because of their uniform and also sheer numbers. Security is attaining greater importance day-by-day because of the increase in the value of the assets and the threats to them. As the size of buildings and complexes increase, security operations become more complex and technology oriented.

## EXERCISE

Visit a Security Company and study the organizational structure and the various documents maintained by the company. Also record the role and functions of the key officials of the company.

### A. Fill in the Blanks

1. Private security generally covers security of \_\_\_\_\_, Property and Information.
2. The primary aim of private security is to provide a \_\_\_\_\_ and secure environment.
3. Section \_\_\_\_\_ of the Criminal Procedure Code of India bestowed power of arrest to the common citizen if a cognizable offence is committed in his/her presence.
4. The security patrol falls into two main groups i.e. \_\_\_\_\_ patrol and static assignment patrol.
5. CCTV stands for \_\_\_\_\_ Television.
6. Instructions related to day-to-day working and procedural requirements are known as \_\_\_\_\_ Instructions.

7. The plan that describes the action to be taken in the event of a serious incident such as fire or a disaster is known as \_\_\_\_\_ plan.

## CHECKLIST FOR ASSESSMENT ACTIVITY

Use the following checklist to see if you have met all the requirements for assessment activity.

### Part A

- ✦ Differentiated between role and functions of private security guards.

### Part B

Discussed in class the following:

- ✦ What is the scope of private security in India?
- ✦ What are the role and responsibilities of private security guard?

### Part C

#### Performance standards

The performance standards may include, but not limited to:

Performance Standards	Yes	No
Demonstrated the knowledge of security industry.		
Identify the role and functions of private security guard.		

## Session 2: Role and Functions of Security Personnel

### Relevant Knowledge

#### Security Guard

A Security Guard is defined as any person providing private security with or without arms to another person or property or both and includes a supervisor (PSARA Act, 2005). He/she works under the supervision of Security Supervisor. He/she should always maintain a professional appearance, behaviour and exhibit positive attitude.

The job of a Security Guard varies, so it is extremely important for the Security Guard to know exactly what the employer specifically expects of them. The Standard Operating Procedures (SOPs) for a security guard varies with the type of job that the guard is doing. He/she is required to perform the following general role and functions:

- ✦ Wear neat and tidy uniform.



- ✦ Maintain hygiene and proper grooming.
- ✦ Obey and pass on to other Security Guards all orders and instructions received from Supervisor.
- ✦ Talk politely with students, staff, and visitors and assist them to provide any necessary information of the Institute.
- ✦ Prevention or detection of intrusion, unauthorized entry or activity, vandalism or trespass on private property.
- ✦ Be watchful while on night patrol and check all suspicious persons, and allow no one to pass the security gate without proper authorization.
- ✦ Work as a team with other security personnel to ensure optimal safety of the person/organization and communicate frequently with each other.
- ✦ Make proper entry in the visitor log and collect vendor/visitor Photo ID card.
- ✦ Prevent or detect theft, loss, embezzlement, misappropriation or concealment of merchandise, money, valuables, documents or papers.
- ✦ Leave his post only after giving charge to the other Security Guard.
- ✦ Adhere to and enforce established company rules, regulations, policies and practices.
- ✦ Report incidents as per the procedure.

### Eligibility for Security Guard

A person shall be eligible for employment as Security Guard if he fulfills the standards of physical fitness as specified in the PSARA Act (2005). The specifications are as follows:

- (a) **Height:** 160 cms for male and 150 cms for female.
- (b) **Weight:** According to standard table of height and weight, chest 80 cms with an expansion of 4 cms (for females no minimum requirement for chest measurement).
- (c) **Eyesight:** Far sight vision 6/6, near vision 0.6/0.6 with or without correction, free from colour blindness. He/she should be able to identify and distinguish color display in security equipment.
- (d) Read and understand displays in English alphabets and Arabic numerals.
- (e) Free from knock knee and flat foot. He/she should be able to run one kilometer in six minutes.

- (f) **Hearing:** Free from hearing defects. He/she should be able to hear and respond to the spoken voice and the alarms generated by security equipments.
- (g) The candidate should have dexterity and strength to perform searches, handle objects and use force for restraining the individuals.
- (h) A candidate should be free from evidence of any contagious or infectious disease. He should not be suffering from any disease which is likely to be aggravated by service or is likely to render him unfit for service or endanger the health of the public.

### Types of Security Guard

1. **Personal Security Guards:** They are appointed for the purpose of providing physical security to their employers. They are also known as black cats or bouncers and accompany their employers everywhere.
2. **Residential Security Guards:** They are employed in residential colonies, apartments, aged homes, and other residential areas for providing security to their clients.
3. **Corporate Security Guards:** They are employed for internal and external security of the business assets. Corporate security includes protection of corporate buildings, shopping malls, private organization, hospitals, etc.
4. **Private Security Guards:** They are employed by businessmen and entrepreneurs for private security services.
5. **Mobile Security Guards:** The mobile security guards keep moving around the perimeter and observe and monitor people for suspicious behaviour or actions.
6. **Static Security Guards:** Unlike mobile security guards, they stay at one place and monitor the movement of the people and materials. They may also use electronic surveillance system to perform the job.

### Security Supervisor/Head Guard

Supervisor is a person in the first-line management who monitors and regulates employees for their performance with regard to assigned or delegated tasks. Normally a security supervisor is placed on 15 security personnel deployed at a site. However, one person with experience and capability is appointed as 'Head Guard' to perform the duties of a supervisor in a shift involving less than 10 persons.



The role and responsibilities of Security Supervisor include the following:

- ★ Supervise the security staff as per the company's policies and rules.
- ★ Educate the security staff on the various procedures and systems approved by the management.
- ★ Conduct training activities for the security staff.
- ★ Maintain security equipment and gadgets.
- ★ Deploy security personnel for optimum use so as to ensure total security of the institute/organization/residential colony.
- ★ Ensure the maintenance of entry and exit log.
- ★ Update and sign all Daily Security Report.
- ★ Monitor inward and outward loading of goods, provision and other materials.
- ★ Report all violation of Institute's rules and regulations and special orders to the Head of Security/Management.

### Field Officers/Inspectors

These are the persons responsible to the management of the security company to enforce and implement the policies.

### Assignment Officer

He in general terms a person who monitors and regulates employees for their performance of assigned or delegated tasks.

### Assistant Security Officer

Assistant security officer is on the pay roll of the security company deployed at the site to monitor and regulate employees for their performance of assigned or delegated tasks. Normally ASO is placed when the deployment exceeds 15 persons or more in each shift. He coordinates and liaises with the principal employer and the security company and performs a customer care role.

### Carry Home Emoluments and Benefits in the Private Security Industry

**Pay and Allowances:** In the security sector, your pay depends on the level of the position and the company. In general, the pay is governed by the Minimum Wages Act of the State.



**Provident Fund (PF):** An employee saves 12% of the basic wages and equal amount is contributed by the employer (8.33% towards pension fund & 3.67% towards contribution of Provident Fund). On completion of 10 years contribution to the fund all employees are entitled to pension on attaining the superannuation age of 58 years.

Pension depends on the total subscription made in the fund. Some of the benefits accrued are as follows:

- (a) Lump sum payment of accretion with interest on retirement / leaving the job.
- (b) Partial withdrawal during job for specified purposes.
- (c) Provision of taking early pension but not before attaining the age of 50 years.
- (d) Deposit Linked Insurance Scheme: Upon death while in service, an additional payment in lump sum equal to average P.F. accretion subject to maximum of Rs. 60,000 is given.
- (e) Employees' Pension Scheme: Pension to member on retirement/invalidity.
- (f) Pension to Family members on member's death.

**Employees State Insurance Scheme (ESIC) Coverage:** Under the scheme employee's contributory insurance cover is available at a marginal contribution of 1.75% of basic wages. The following benefits are available:

**Medical Benefit:** Medical care is provided to the Insured person and his family members from the day he/she enters insurable employment. There is no ceiling on expenditure on the treatment of an Insured Person or his family member. Medical care is also provided on payment of a token annual premium of Rs.120/- to the retired and permanently disabled insured persons and their spouses.

**Sickness Benefit (SB):** Cash compensation at the rate of 70 per cent of wages is payable to insured workers during the periods of certified sickness for a maximum of 91 days in a year. In order to qualify for sickness benefit the insured worker is required to contribute for 78 days in a contribution period of 6 months.

- (a) **Extended Sickness Benefit (ESB):** ESB extendable up to two years in the case of 34 malignant and long-term diseases at an enhanced rate of 80 per cent of wages.
- (b) **Enhanced Sickness Benefit:** Enhanced Sickness Benefit equal to full wage is payable to insured persons undergoing sterilization for 7 days and 14 days for male and female workers, respectively.



**Maternity Benefit (MB):** Maternity Benefit for confinement/pregnancy is payable for three months, which is extendable by further one month on medical advice at the rate of full wage subject to contribution for 70 days in the preceding year.

### Disablement Benefit

- (a) **Temporary disablement benefit (TDB):** This benefit is available from day one of entering insurable employment and irrespective of having paid any contribution in case of employment injury. Temporary Disablement Benefit at the rate of 90% of wage is payable so long as disability continues.
- (b) **Permanent disablement benefit (PDB):** The benefit is paid at the rate of 90% of wage in the form of monthly payment depending upon the extent of loss of earning capacity as certified by a Medical Board.

**Dependants' Benefit (DB):** It is paid at the rate of 90% of wage in the form of monthly payment to the dependants of a deceased Insured person in cases where death occurs due to employment injury or occupational hazards.

### Other Benefits

**Funeral Expenses:** An amount of Rs.10,000/- is payable to the dependents or to the person who performs last rites from day one of entering insurable employment.

**Confinement Expenses:** An insured woman and an insured person in respect of his wife shall be paid a sum of rupees one thousand per case as "confinement expenses" (earlier termed as medical bonus), provided that the confinement occurs at a place where necessary medical facilities under the ESI scheme are not available. i.e., where facility for confinement is not available in the ESI institution. Also confinement expenses shall be payable for two confinements only.

**Rajiv Gandhi *Shramik Kalyan Yojana* 2005:** An Insured Person who become unemployed after being insured three or more years, due to closure of factory/establishment, retrenchment or permanent invalidity are entitled to:

1. Unemployment Allowance equal to 50% of wage for a maximum period of up to one year.
2. Medical care for self and family from ESI Hospitals/Dispensaries during the period IP receives unemployment allowance.
3. Vocational Training provided for upgrading skills - Expenditure on fee/travelling allowance borne by ESIC.

**Workman Compensation:** In case a personal injury is caused to a workman by accident arising out of and in the course of his employment, his employer is liable to pay compensation in accordance with the provision of the Act within 30 days from the date when it fell due otherwise he would also be liable to pay interest and penalty.

**Bonus Payment:** Any employee on a salary or wage not exceeding [three thousand and five hundred rupees] per month in any industry to do any skilled or unskilled manual, supervisory, managerial, administrative, technical or clerical work for hire or reward, whether the terms of employment be express or implied is eligible for bonus up to a maximum of “ten thousand rupees”

**Leave:** All employees are governed by the company policy and the labor laws prevalent in the states.

## **EXERCISE**

Prepare a comparative chart on the role and functions of private security professionals in the following places:

1. Malls
2. Hospitals
3. Construction sites
4. Supermarkets
5. Manufacturing plants
6. Private home alarm maintenance

### **A. Short Answer Questions**

1. Explain the career opportunities available in private security

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2. Write short note on the following:

(a) Control room

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(b) Patrolling

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(c) Access control system

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### B. Fill in the blanks

1. In Rajiv Gandhi Shramik Kalyan Yojana 2005 the bonus payment amount is up to max. \_\_\_\_\_. (ten thousand rupees)
2. Maturity benefits for confinement/pregnancy is payable for \_\_\_\_\_ which is extendable by further \_\_\_\_\_ month on \_\_\_\_\_ advice. (three months, one, medical)
3. Employees State Insurance Scheme (ESIC) coverage is available at a marginal contribution of 1.75% of \_\_\_\_\_. (basic wages)
4. Under sickness benefits cash compensation at the rate of \_\_\_\_\_ % of wages is payable to insured workers. (70)
5. On completion of \_\_\_\_\_ years contribution to the fund all employees are entitled to \_\_\_\_\_ on attaining the superannuation of \_\_\_\_\_ years. (10, pension, 58)

### C. Multiple Choice Questions

Tick the correct answer

1. Personal security guards are also called
  - a) Black Cats
  - b) Bouncers
  - c) Both a and b
  - d) None of the above
2. Bouncers are
  - a) Move around
  - b) Private security
  - c) For external and internal business
  - d) Personal security
3. Security guards stay at one place and may use electronic surveillance system to monitor people
  - a) Static people
  - b) Personal security
  - c) Private security
  - d) Corporate security
4. Employee State Insurance Scheme does not covers
  - a) Medical benefits
  - b) Workman compensation
  - c) Sickness benefits
  - d) Confinement expenses

### **CHECKLIST FOR ASSESSMENT ACTIVITY**

Use the following checklist to see if you have met all the requirements for assessment activity.

#### **Part A**

- (a) Differentiated between the types of security guard.

#### **Part B**

Discussed in class the following:



- (a) What are the eligibility criteria for appointment to the post of security guard in India?
- (b) What are the basic emoluments and benefits that a security guard gets during the service?

## Part C

### Performance Standards

The performance standards may include, but not limited to:

Performance Standards	Yes	No
Identify the role and functions of security personnel in retail environment.		

## Session 3: Material Handling in Housekeeping

### Relevant Knowledge

Effective housekeeping can eliminate some workplace hazards and help get a job done safely and properly. Poor housekeeping can frequently contribute to accidents by hiding hazards that cause injuries. If the sight of paper, debris, clutter and spills is accepted as normal, then other more serious health and safety hazards may be taken for granted.

There are many different types of household chemicals used for disinfection, removing the dust and dirt and maintaining surface. The products are available in various forms such as powder, liquid or spray form. Depending on the type of cleaning tasks, the basic ingredients of various household chemicals may differ. Some of commonly used applications of household chemicals are polishing furniture, oven cleaning, lime scale removal and drain clearing.

Housekeeping is also a word used in retailing to indicate that the floors have indeed been polished, the carpets swept and the displays are kept looking shipshape. It is a broad term that is used for both indoor cleaning as well as outdoor chores like washing windows and sweeping doormats. Store cleanliness is an important part of retail. Customers want to



shop in a clean, well-lighted store so they have confidence that the merchandise

purchased there is also clean and of good quality. Dirt and trash have no place on the sales floor, and grimy windows and grubby walls and counters detract from this perception. Housekeeping is an ongoing task.

Housekeeping includes keeping work areas neat and orderly; maintaining halls and floors free of slip and trip hazards; and removing of waste materials (e.g., paper, cardboard) and other fire hazards from work areas. It also requires paying attention to important details such as the layout of the whole workplace, aisle marking, the adequacy of storage facilities, and maintenance. Good housekeeping is also a basic part of accident and fire prevention.

Good safety housekeeping can significantly reduce accidents and injuries in any type of work environment. By developing good safety habits, and by being aware of their work environment and any hazards associated with it, employees can help to create a much safer workplace.

Effective housekeeping results in:

- ✦ Reduced handling to ease the flow of materials.
- ✦ Fewer tripping and slipping accidents in clutter free and spill-free work areas
- ✦ Decreased fire hazards
- ✦ Lower worker exposures to hazardous substances
- ✦ (e.g. dusts, vapours) Better control of tools and materials, including inventory and supplies
- ✦ More efficient equipment cleanup and maintenance





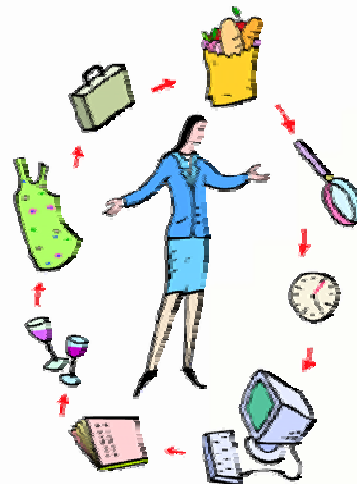


- ✦ Better hygienic conditions leading to improved health
- ✦ More effective use of space
- ✦ Reduced property damage by improving preventive maintenance
- ✦ Less janitorial work
- ✦ Improved morale
- ✦ Improved productivity (tools and materials will be easy to find)



Housekeeping tasks can be grouped into a number of areas, including:

- ✦ Occupational Health and Security
- ✦ Safety Cleanliness (sanitation) controls
- ✦ Damage avoidance
- ✦ Fire prevention and protection
- ✦ Safe, secure storage systems
- ✦ Regular inspections
- ✦ Stock control
- ✦ Personal hygiene and appearance
- ✦ Maintenance and storage of housekeeping equipment



Common housekeeping tasks are:

- ✦ Vacuum cleaning
- ✦ Painting
- ✦ Weeding
- ✦ Maintenance
- ✦ Waste removal

## Material Handling

Material handling is any transporting or supporting of a load by one or more workers. It includes the lifting, holding, putting down, pushing, pulling, carrying or moving of a load.



While handling the material one should ensure that the material is stacked securely, blocked or interlocked. All storage areas are marked. All workers understand material storage and handling procedure. Materials are stored in areas that do not interfere with workers or the flow of materials. Hazardous materials are stored in approved containers and away from ignition sources.

A person has to see that equipment is in good working order, with all necessary guards or safety features operational or in place. All the tools and machinery are inspected regularly for wear and leaks. These machines and tools are cleaned regularly.



Maintaining the work area in a tidy, clean and safe way reflects a positive store image and helps create an environment that is pleasant for all customers and conducive to sales.

Retail stores vary considerably from large department stores to much smaller specialty stores, therefore the housekeeping policies and procedures can also vary considerably. Team members must be familiar with their store's policies and procedures and occupational health and safety requirements as this will ensure the store looks its best and the correct image is being projected to customers.



There are many areas in a store that need to be considered, including:

- ✦ point of sale area
- ✦ counters
- ✦ walkways/aisles
- ✦ merchandise
- ✦ fittings and fixtures
- ✦ storerooms
- ✦ fitting rooms
- ✦ receiving docks



## Housekeeping Materials

### Maintenance of Housekeeping Equipment

All housekeeping equipment must be stored safely and securely and according to the manufacturer's instructions where appropriate. This will ensure a safe environment for staff, customers and any other visitors to the store. Cleaning equipment varies from store to store. However, some equipment is used in all retail outlets. Common equipment includes:



Mops	Window Cleaner
Buckets	Cleaning Chemicals
Brooms	Floor Polishers
Cloths	Hazard Warning Signs
Dusters	Dust Pans and Brushes
Bins	Ladders
Blades	Trolleys
Spray	Cleaner Vacuums

Cleaning chemicals often are hazardous and can be identified as such from the label. Many tools or items of equipment requiring cleaning are equipped with guards to protect the operator.



Equipment should never be operated without the guard in place and the manufacturer's guidelines must be followed to ensure safe use of equipment.

### EXERCISE

1. Visit an Mall or Supermarket or an Industry, interact with the employer and employees of the organisation/industry and ask the following questions and write their reply in not more than 50 words:

#### Questions for Employers

- (i) What should your employees know before handling and storing materials?

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(ii) What are the potential hazards for workers in retail?

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(iii) What kinds of equipments are needed for store?

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(iv) Prepare a checklist of the housekeeping equipment that is generally used in retail store for housekeeping activities.

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(v) Visit Mall or departmental store and use the checklist prepared by you, check the housekeeping equipments that exist in the mall/departmental store for housekeeping in retail.

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(vi) List any 5 equipments that are used for routine housekeeping.

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### Questions for Employees

(i) Are you happy with the provisions made for taking care of your physical and safety requirements at the workplace?

Employee A: Yes/No



Employee B: Yes/No

Employee C: Yes/No

Employee D: Yes/No

Employee E: Yes/No

- (ii) Which are the hazardous chemicals that the employees think are affecting their physical well being at the workplace?

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- (iii) What are the safety requirements for material handling?

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- (iv) What experience do you have using different machines/types of equipment?  
List are those you most familiar with.

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- (v) What types of items or equipment have you been required to keep clean?

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- (vi) What types of items have you handled in your job? Were any of these items dangerous?

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- (vii) Name 5 key points to consider when applying housekeeping procedures to your counter area.

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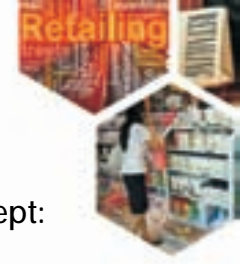
**A. Fill in the blanks**

1. Housekeeping is an \_\_\_\_\_ task.
2. Effective \_\_\_\_\_ can eliminate some workplace hazards.
3. \_\_\_\_\_ materials are stored in approved containers and away from ignition sources.
4. Good safety housekeeping can significantly reduce \_\_\_\_\_ and \_\_\_\_\_.
5. A material is hazardous if it can \_\_\_\_\_ a person's health, either long or short term.

**B. Multiple Choice Questions**

Tick the correct answer

1. The short distance movement of material between two or more points refers to:
  - a) Warehousing
  - b) Transportation
  - c) Material Handling
  - d) Materials management



2. Each of the following is a question associated with materials handling, except:
  - a) How will the product be handled?
  - b) What kind of equipment is needed to handle the material?
  - c) In what form will the product be?
  - d) How much is the product worth?
3. Which of the following activity comes under housekeeping?
  - a) School admission
  - b) Hoover the floor
  - c) Purchase of material
  - d) Sale of flat
4. Which of the following would you check to see if a material is considered 'hazardous'?
  - a) The product label
  - b) Purchasing record
  - c) Material safety data sheet
  - d) Hazardous material inventory

**C. True or false**

1. Materials handling deals with the short distance movement of the material between two or more points. (T)
2. Equipment should not be placed where it could easily fall or be pulled off the counter. (T)
3. The quick and easy jobs such as mopping and scrubbing to be done before the shop opens or end of day. (T)

**CHECKLIST FOR ASSESSMENT ACTIVITY**

Use the following checklist to see if you've met all the requirements for Assessment Activity.

**Part A**

- ★ Differentiated between different types of materials.

- ★ Differentiated between hazardous and non-hazardous materials.
- ★ Differentiated between different types of hazards and chemicals.

## Part B

Discussed in class the following:

- ★ What is housekeeping?
- ★ What is the importance of effective housekeeping?
- ★ Why do we need to exercise daily for housekeeping?
- ★ What is material handling?
- ★ What are the different types of hazardous materials?

## Part C

### Performance Standards

The performance standards may include, but not limited to:

Performance standards	Yes	No
Able to identify the various types of housekeeping materials & equipment.		

## Session 4: Procedure in Housekeeping

### Relevant Knowledge

A clean place to work is necessary for safety. Good housekeeping is a part of your job. In order to have a pleasant and safe work place, everyone must do his/her part to keep the plant orderly and clean. Good housekeeping will protect you and your fellow employees against slipping, tripping and other hazards.



1. Immediately clean up any paint, grease, oil, water, etc. that has spilled on the floor. Someone could slip causing serious injury.
2. Pick up any banding, scrap metal or other metal debris and put in scrap metal bins.



3. Pick up any scrap lumber, saw dust etc. and put into scrap lumber bins.
4. Put any scrap papers, boxes, etc., into the proper garbage containers or recycling bins.
5. Put cans into bins marked for cans.
6. Clean up debris and organize tables and work stations that you have been using, so that the next person can start with a clean work area.
7. Clean any machine and surrounding area after use.
8. Return all hand tools to their proper places after use or at end of your shift.
9. Keep all walkways, aisles, roadways, and areas in front of fire extinguishers, electrical panel boxes free of obstruction.
10. Keep your rest rooms and lunchrooms as clean and neat as possible. Put all garbage into garbage cans, not beside them. Do not put paper towels in the toilets.
11. Keep your forklift cab area clean and do not transport or store items in cab.
12. Immediately sweep up any Blast Machine shot that you notice on the floor. Shot on the floor is very dangerous, as it is a slipping hazard.
13. Never leave hooks or hangers on the floor always put them in their proper place.
14. Before end of shift, empty garbage cans into the garbage bins and haul the bin outside and dump into the "Loraas" bin.
15. Always put all brooms and shovels back to their proper areas and places after use.
16. Keep the office and the surrounding area clean and clear of parts, junk, etc.
17. Clean the computers at least once a week by wiping them with computer cleaning fluid.
18. Stack pallets, boxes, baskets, etc. neatly to avoid them falling over.
19. Organize your work station as neatly and efficient as possible. Avoid over clutter.
20. Keep stairway and platforms clear of obstruction.
21. Keep storage areas neat and organized.
22. Clean up any air lines, extension cords, etc. after use.
23. Keep area clear around safety eye wash fountains and showers, safety spill kit, emergency switches, etc.





24. Keep you locker and change area clean and neat.
25. Keep walk through doors and overhead doors clear and free of snow etc.
26. Keep desks and filing cabinets clean and well organized.
27. Clean office, computer and printer areas at the end of every shift.
28. Clean as you go. (Continually clean your work area as you work.)
29. Remember, A Safe Shop is a Clean Shop!

When applying housekeeping procedures to your counter area, five key points must be considered.

1. Clean
2. Safe
3. Uncluttered
4. Well organized
5. Customer friendly

Keeping these five key points in mind at all times will ensure that your counter area contributes to the overall professional and positive image that your store presents.

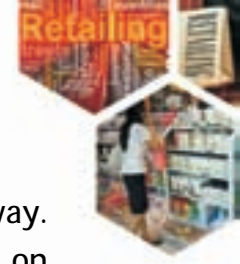
### **Waste Removal and Disposal**

In a busy retail environment it is common to accumulate general waste materials. General materials might include:

- ✦ Packaging materials
- ✦ Rubbish
- ✦ Broken or damaged merchandise
- ✦ Paper
- ✦ Glass
- ✦ Plastic

If the retailer deals with food, other food or liquid waste materials might include:

- ✦ Food substances
- ✦ Fats
- ✦ Oils.



All waste must be removed safely and disposed of in an environmentally friendly way. Policies on waste removal and disposal will vary from store to store depending on current housekeeping policies and procedures. The Environment Protection Authority in NSW can work with retailers to assist them in designing and implementing appropriate waste disposal strategies.

When removing general waste it is important to:

- ✦ Use correct lifting techniques
- ✦ Wear gloves or other personal protective equipment as required move steadily – don't rush
- ✦ Remove waste from customers' sight
- ✦ Separate waste in accordance with store policies and procedures to ensure effective recycling.

Another important consideration is the environment - naturally, you want to ensure that you are following "environmentally-friendly" waste disposal procedures.

Most waste ends up in land-fill areas around the country. These areas occupy a lot of space, and in some cases the waste pollutes the ground so that the whole area cannot be used for many years.

It is estimated that over 50% of the waste currently occupying space in land-fill areas could have been recycled or reused, if people had followed responsible waste removal and disposal procedures.

## EXERCISE

1. What is the cleaning procedure should carry out in shopping arcade?

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2. What should be worn when picking up broken glass?

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3. Name 8 types of general waste.

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4. List at least 6 different machines that you may come into contact with in the Retail Industry.

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5. Decide whether the tasks in the list below should be carried out daily, weekly or monthly.

Cleaning any glass

Cleaning counters

Cleaning displays

Cleaning EFTPOS equipment

Cleaning point of sale area

Cleaning the fridge

Cleaning windows

Clearing walkways

Washing walls

Dusting displays

Polishing

Removing waste

Stock returns

Sweeping

Tidying shelves

Tidying storeroom

Vaccuming

Washing fixtures & fittings



Daily	Weekly	Monthly

**A. Fill in the blanks**

1. Good housekeeping efforts are a part of the retail \_\_\_\_\_ prevention and \_\_\_\_\_ prevention program.
2. Slips, trips and falls are \_\_\_\_\_ accidents in the retail workplace and they often lead to serious injury.

**B. True or false**

1. All housekeeping tasks must be performed to the standard outlined in the store policy and procedure manual
2. Whilst undertaking housekeeping duties, team members must not ensure the safety of themselves and customers
3. It is not important that all employees perform their tasks in accordance with store policy and procedures, ensuring minimum disruption to customers and other business activities. Standards are the same in every retail store.
4. It is the employer's responsibility, as far as possible, to provide a safe working environment.
5. Safe work procedures should be prepared by employers with the help of employees to care for the special needs of young and inexperienced workers.

**C. Short Answer Questions**

1. What should you do if the floor is left wet?
2. Good housekeeping includes good sanitation. What sanitary facilities are we required having in the store?

## CHECKLIST FOR ASSESSMENT ACTIVITY

Use the following checklist to see if you've met all the requirements for Assessment Activity.

### Part A

- ✦ Described the procedure in housekeeping.
- ✦ Differentiated waste removal and disposal.

### Part B

- ✦ Discussed in class the following:
- ✦ What is procedure in housekeeping?
- ✦ What is good housekeeping?
- ✦ What are the common factors that involve in procedure in housekeeping?

### Part C

#### Performance Standards

The performance standards may include, but not limited to:

Performance Standards	Yes	No
Able to demonstrate standard procedure in housekeeping.		