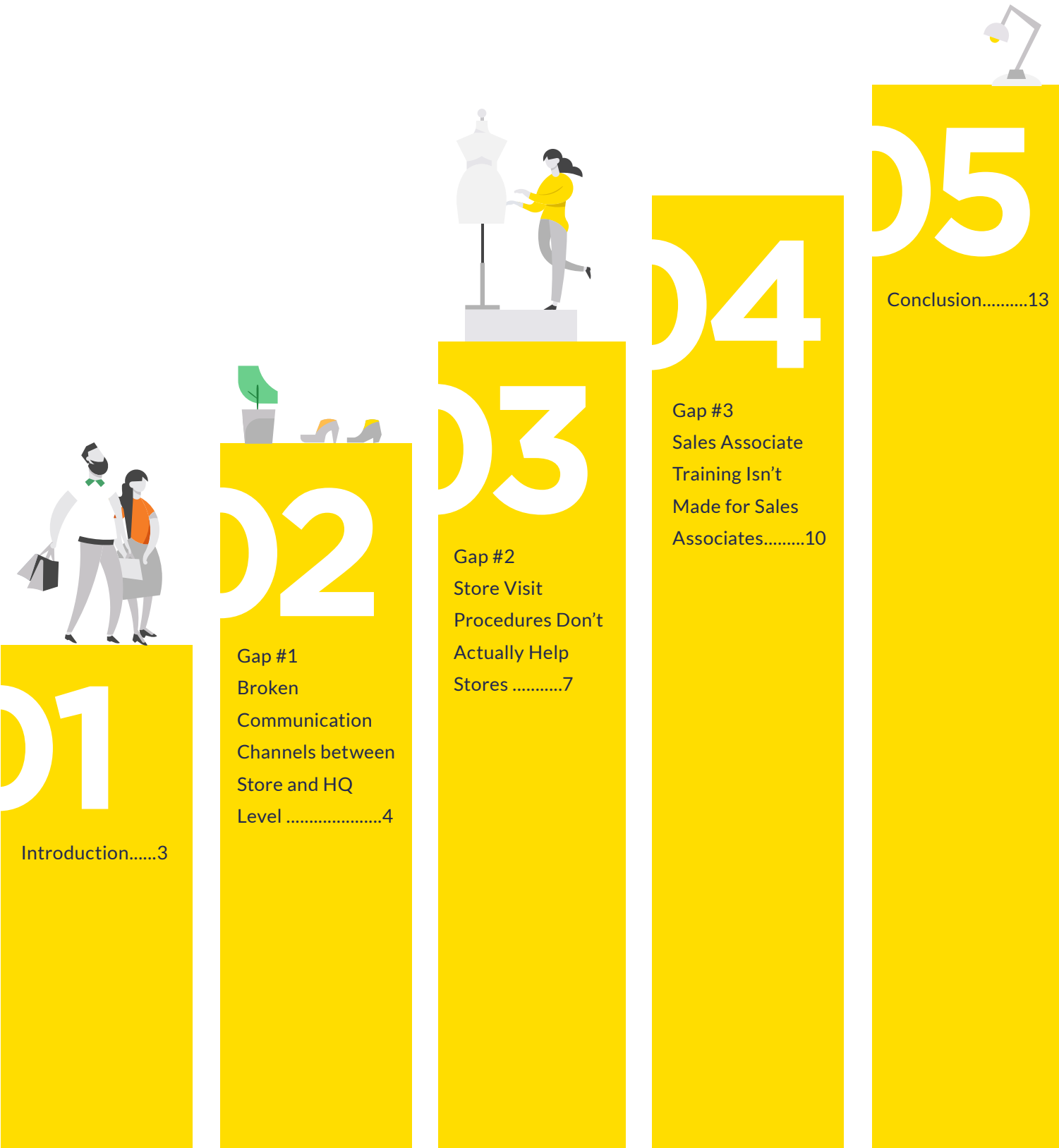




Retail Execution:

**3 Strategies for In-Store Success
and Improved Customer Experience**

Table of Contents



01	Introduction.....3
02	Gap #1 Broken Communication Channels between Store and HQ Level4
03	Gap #2 Store Visit Procedures Don't Actually Help Stores7
04	Gap #3 Sales Associate Training Isn't Made for Sales Associates.....10
05	Conclusion.....13

Introduction

“We want our shoppers to have a mediocre customer experience, so they leave our stores disappointed.”

Said no retailer, ever.

Why do bad customer experiences still happen, then?

It's not because the retail apocalypse is upon us, despite popular opinion.

It's not because in-store shopping has become obsolete.

And it's definitely not because retailers don't pour enough time and money into crafting their brand story, products and store design.

A good in-store customer experience consists of 3 things:

1. **Aesthetic appeal**
2. **Finding things easily**
3. **Feeling important and valued**

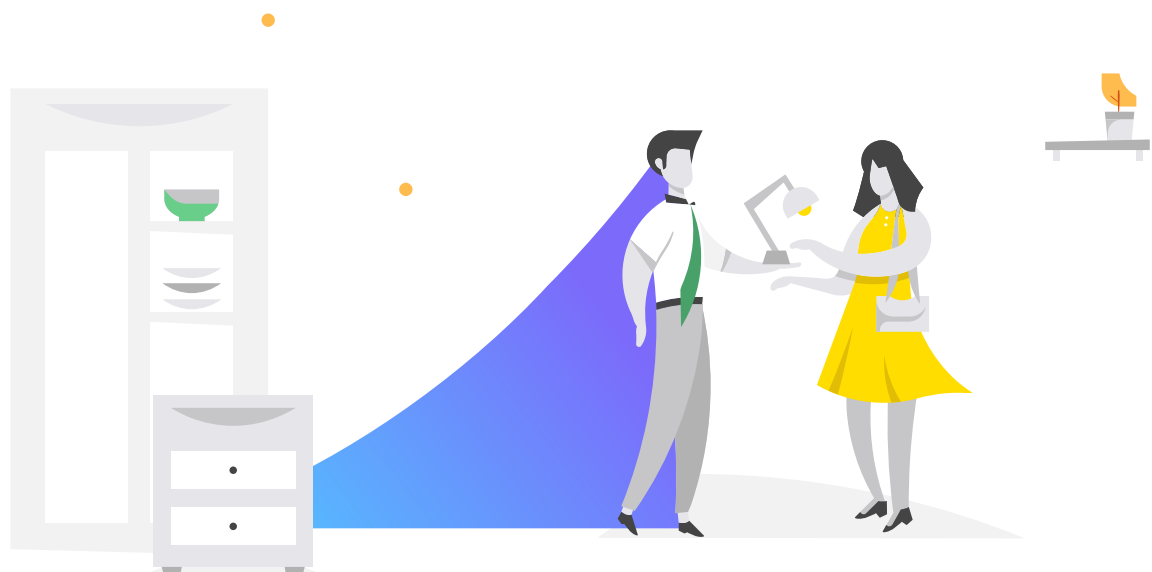
If stores can't provide all of these things, they've made themselves obsolete. This is why we've seen so many iconic retailers go into administration this year.

Strategy is important, but it's all in the execution. If no plans and procedures are made for executing the vision when things get tough, the vision slowly dies.

Bad customer experiences happen when what a retailer wants to happen in stores doesn't happen. In other words, there's a gap between the vision and the execution.

In our work with retailers we've found that there are 3 such gaps between the HQ vision and the reality customers experience in stores. Retailers are making these worse without even knowing it.

We'll guide you through why these gaps occur, why they have such a negative impact on customer experience, and procedures retailers can put in place at all levels of the organization to fix them.



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Gap #1 - Broken Communication Channels Between Store and HQ Level

How It Impacts Customer Experience

If a tree falls in the forest and no one is around to hear it, does it make a sound?

If you create the perfect shopping experience but customers never experience it, does it even exist at all?

Let's jump back to the 3 things that make a good customer experience for a second and consider how they translate into a store team's day-to-day tasks.

1. Aesthetic appeal - Visual merchandising guidelines and operational guidelines like cleaning and maintenance procedures.

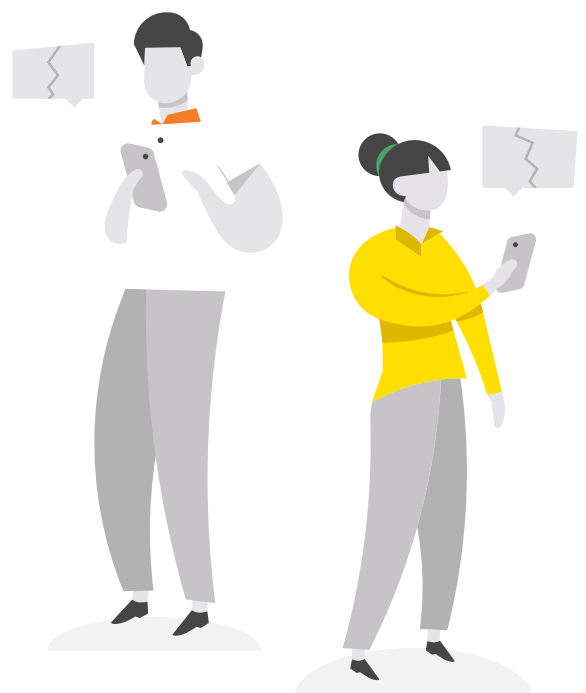
2. Finding things easily - VM guidelines in the form of store layout instructions, procedures for handling out-of-stock items.

3. Feeling important and valued - Sales and customer service guidelines as well as product knowledge.

HQ sends instructions to the stores that guide them through implementing the desired customer experience. How these guidelines are sent to stores is immensely important.

Imagine you've bought a wardrobe from IKEA. In the box is a 20 page instruction manual. You have 10 minutes to assemble it. What will the end result be like?

Same thing for store teams. They might receive all the information about how to finish the tasks, but because there's so much information and so little time in their busy days the end result won't be what's needed to wow shoppers.



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

65%

of HQ retail staff think difficulty following head office instructions negatively impacts store execution.

Source: RIS News, 2015

65% of HQ retail staff surveyed by RIS News thought the difficulty store managers have following head office instructions negatively impacts accurate store execution on campaigns.

Retailers know the flow of information to stores can prevent them from properly executing on guidelines, but it's easy to be chained to legacy procedures.

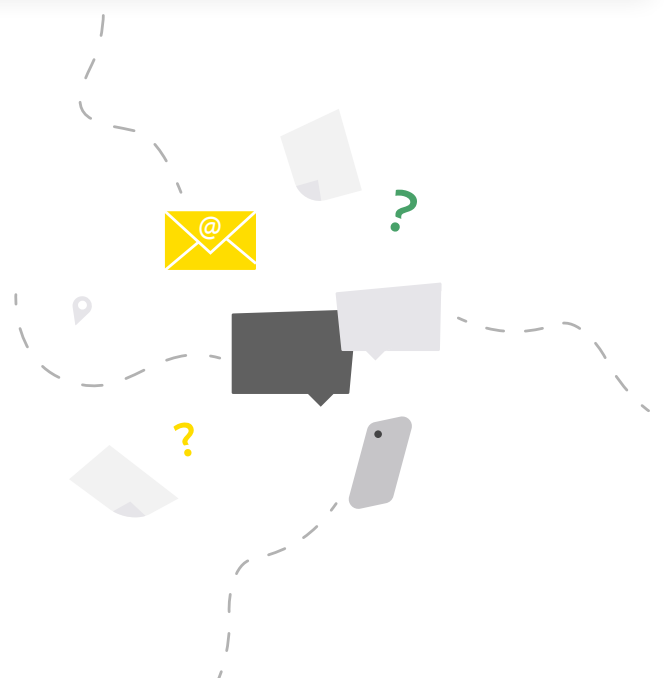
The HQ vision: HQ sends the stores all the guidelines they need. Mistakes and inconsistencies happen because stores aren't trying hard enough.

The reality: The information is all there but difficult and time-consuming for store teams to get through. Time is lost that could be spent with customers. Stores don't feel supported by HQ, because they're expected to get through so much info but no one listens when they need help.

The obstacle: The way HQ sends guidelines to stores.

Symptoms of Broken Communication Channels in Stores

- Guidelines and instructions are sent via email, phone calls, WhatsApp or paper forms that aren't mailed directly to the stores.
- Pictures in paper guidelines aren't in colour which makes it tough for store teams to differentiate between products.
- Only one copy of guidelines is sent to stores.
- If a store gets the wrong POS material or is missing parts of a display, the usual procedure is for the store manager to send an email to HQ.
- The store manager has the discretion to swap in something else when parts of a display are missing - something that could be totally off-brand.
- Store managers can't escalate requests for out-of-stock items, even while unhappy shoppers are leaving empty-handed.



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Why This Happens

The retailer hasn't put itself into the shoes of its store teams and thought about the easiest ways for busy employees to perfectly implement visual, operational and sales guidelines.

This results in a divide between the different levels of the organisation, where stores can't get what they need from head office and head office has no idea what's going on in stores.

That means that stores don't have the resources to follow through on that perfect customer experience the digital, product and design teams have spent so long crafting. HQ doesn't know that customer experience is off, and over time the list of unsatisfied shoppers grows.

A Few Things That Make Instructions Easier to Get Through Are:

- ▲ Checklists
- ▲ Yes or no questions
- ▲ Reference pictures and diagrams
- ▲ The ability for multiple people to access instructions at the same time so they can work as a team
- ▲ A simple way to ask for clarification

Make it easy for stores to access and understand guidelines from HQ, and you'll have a communication channel that works for your stores, not against them.

Understand

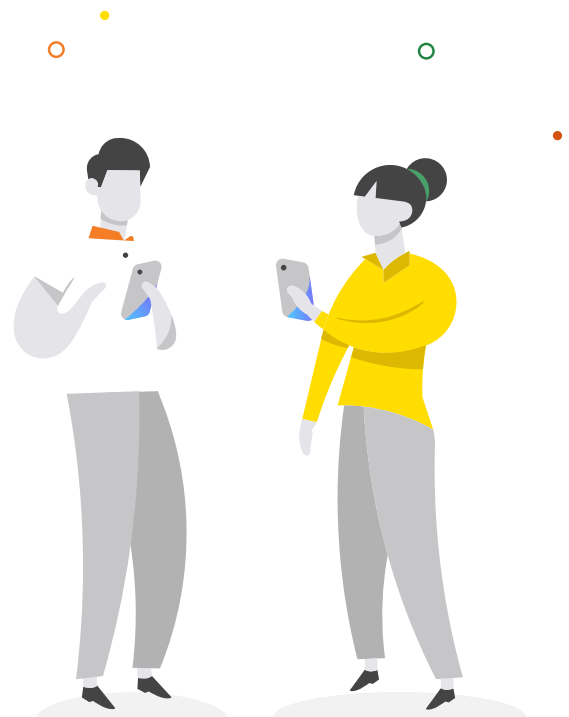
The way instructions are given determines how accurately they'll be completed.

No one likes getting instructions in a huge stack of papers.

Fix

What's needed is a uniform digital communication channel built for 2 main purposes:

- Giving instructions
- Asking for help



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Gap #2 - Store Visit Procedures Don't Actually Help Stores

How It Impacts Customer Experience

Store visits bridge the gap between the theoretical customer experience HQ designs, and the real thing shoppers experience. That puts area managers in a powerful position as facilitators of knowledge between HQ and store level.

Which would be a lot more fun than filling out the reports that make up most store visit procedures.

The problem here is that the procedures area managers are required to carry out during a store visit prevent them from doing what's needed most - coaching the store teams on how to provide perfect shopping experiences.

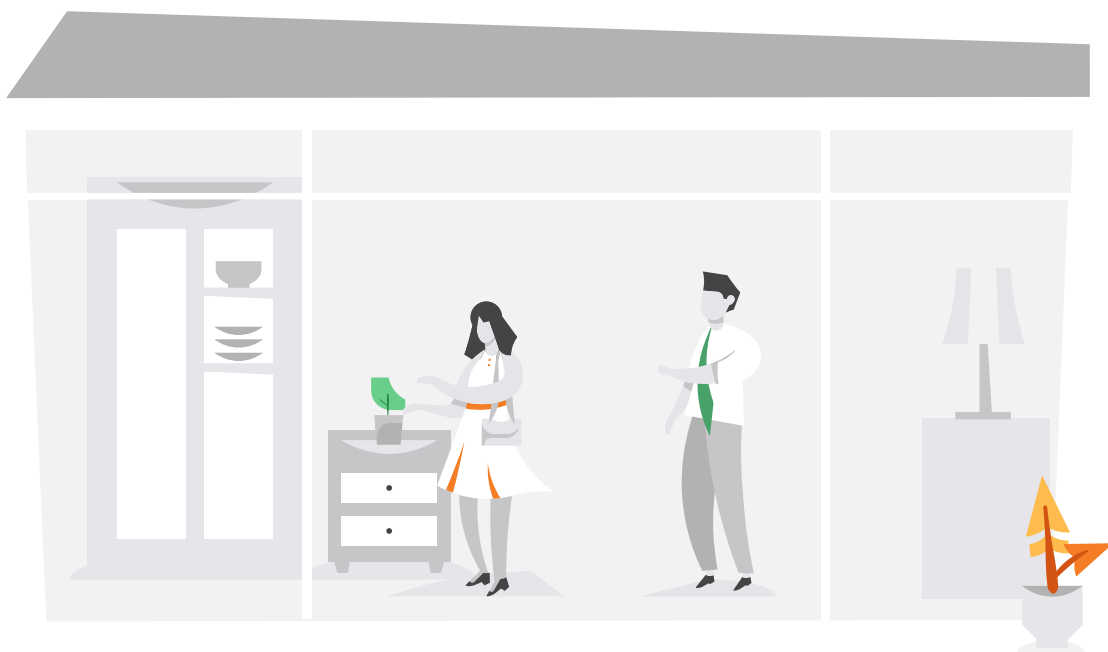
What if store visits were focused on taking the team's sales skills to the next level, and learning how to overcome difficult customer situations before they even happen?

That would probably result in a better shopping experience.

The HQ vision: Store visits are a necessary health check made by area managers to ensure stores look their best and are following all the guidelines.

The reality: Visits are stressful for area managers and scary for store teams. Kind of like visiting the dentist when you know you haven't flossed in months. Or when you're trying to find that report on your laptop when your boss is standing right behind you peering over your shoulder.

The obstacle: Low value admin tasks that take up too much of an area manager's bandwidth.



01

Introduction

02

Gap #1

03

Gap #2

04

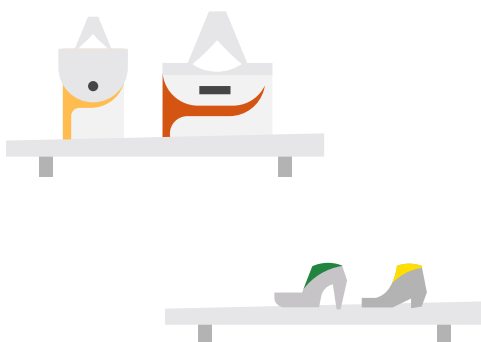
Gap #3

05

Conclusion

Symptoms of Unhelpful Store Visit Procedures

- Store teams are warned about the area manager's visit beforehand and told to be on their best behaviour.
- Store teams are visibly nervous when the area manager is in the store.
- Area managers have the same visit procedures for each store regardless of location or store traffic.
- Taking pictures for reports isn't explicitly part of an area manager's store visit procedure.
- Spending a certain amount of time coaching sales associates isn't built into store visit procedures either.
- After the store visit is over, area managers can be found either in the back office of the store or in their car, crunching numbers on a laptop and compiling everything.
- Areas for improvement and action plans created by the area manager are sent to the store manager via email, scanner or in paper form. This lands the store manager back in the conundrum of Gap #1, because action plans in these formats may be difficult to understand and time-consuming to complete.
- No firm deadlines for fixing errors identified during the store visit are stated in the action plan. Expectations around when and how follow up tasks will be actioned on are unclear.
- When the store manager gets the feedback, there's no concise procedure in place for communicating this to every sales associate.


01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Why This Happens

Helpful, engaged and educated sales associates who can immediately meet customers' needs bring in 69% more revenue than those who can't. Area managers can provide the coaching and training necessary to see this kind of lift in sales.

69%

more revenue is generated by educated, helpful sales associates.

Source: CNBC

Area managers have dozens of stores to visit and admin procedures to get through every day, which means they're pressed for time and stressed out more often than not.

They simply don't have the resources to plan and prioritise their time effectively, which means store teams miss out on the valuable help area managers could provide.

Understand

Store visits should be positive and productive experiences for both area managers and store teams. An area manager's role should be a people focused one. They can make the greatest difference by coaching and motivating store teams.

Fix

Make Store Visits Positive and Productive:

- ▲ Give area managers a store visit reporting tool where they can instantly pull up previous visit reports. Now they can better plan their day and prioritize stores that need their help the most.
- ▲ Automate low value admin tasks like filling out checklists and compiling visit reports.
- ▲ Open up a new communication channel for store managers to receive the area manager's feedback as soon as possible after the visit.



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Gap #3 - Sales Associate Training Isn't Made for Sales Associates

How It Impacts Customer Experience

Sales associates are what differentiate the in-store experience from online. Sales associates have the power to immediately make or break a customer experience.

78% of shoppers surveyed last year said sales associate knowledge is extremely important to them.

78%

of shoppers say that sales associates with a deep knowledge of the product range is extremely important.

Source: PwC, Total Retail 2017

What do these 3 Google reviews for high street retailers all have in common?

“Terrible customer service - head office need to train the staff!!!”

“Ok...staff could be a little more friendly though”

“Very poor customer service staff always talking to each other rather than trying to be helpful. Found the staff in the men's casual department to be very unprofessional just stand around in groups talking to each other.”

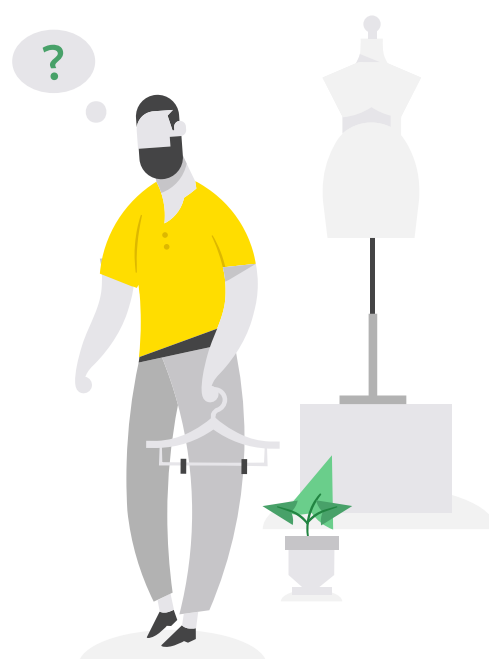
They're all about sales associates.

Training is how sales associates learn how to provide the customer experience the retailer invests so heavily in.

The HQ vision: No training program is perfect, but for the most part store team training provides employees with everything they need for success.

The reality: Training doesn't support sales associate product knowledge, sales and customer service skills, and continuous improvement.

The obstacle: The delivery mechanism for training. The lack of oversight into how employees are being trained, leaving this up to the discretion of the store manager.



01

Introduction

02

Gap #1

03

Gap #2

04

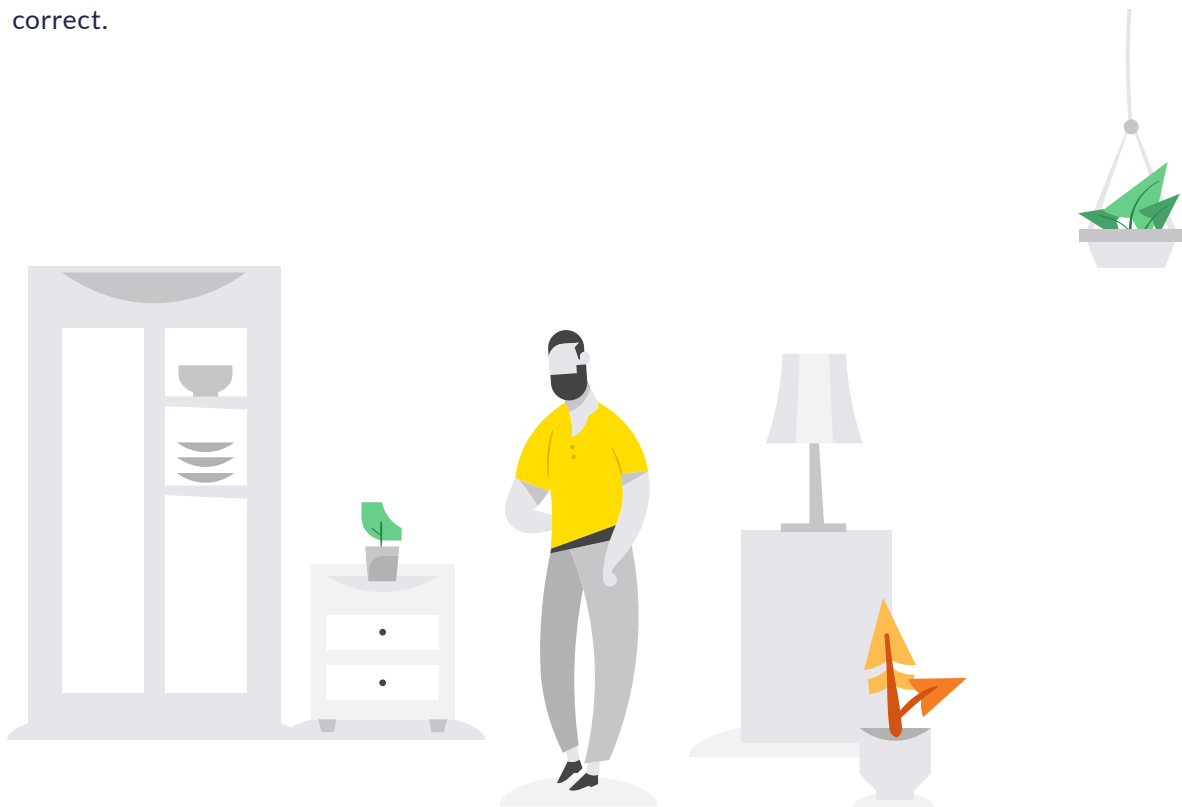
Gap #3

05

Conclusion

Symptoms of Unhelpful Training Procedures

- It's a sales associate's first day. The training materials they receive are a binder full of product specs and hours of training videos to watch.
- There's no standardised procedure for when and how new employees shadow more experienced ones on the sales floor, and no designated sales associate who does the shadowing every time. Corners are frequently cut with this kind of training.
- New employees don't have a dedicated resource to turn to with questions, except busy store managers who don't always have time for questions and might snap at employees. This is demotivating.
- New employees are frequently directed to assistant managers or more experienced employees to get their questions answered - but the answers may not always be correct.
- Employees don't get a refresh training on sales and customer experience skills every few months.
- Sales associates aren't trained differently by management depending on the customer base and overall vibe of their store - e.g. high traffic store loved by tourists vs. a smaller store with a loyal but highly knowledgeable customer base.
- There's no standardised way that store teams are trained on new products or collections.



01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Why This Happens

Lack of introspection.

Even the most senior VP can probably remember a time when they had to sit through a 3 hour PowerPoint training with zero coffee breaks. How well did that information stick?

Understand

Sales associate behaviour and product knowledge are part of a retailer's brand too. They're equally important as the colours in your logo, your signage and the font you use. These are learned in training.

Employee demographics impact learning style. For many sales associates this is their first job, a summer job, or a part time job. They're probably nervous, which impacts how they retain information.

A recent poll* estimates that most adults tune out after 13 minutes - think about how this attention span might decrease for a 17 year old studying for a big exam on the side.

Customers don't care if it's an employee's first day. If customer experience isn't perfect, customers will go elsewhere. And sales associate behaviour has the most immediate and most noticeable impact on customer experience.

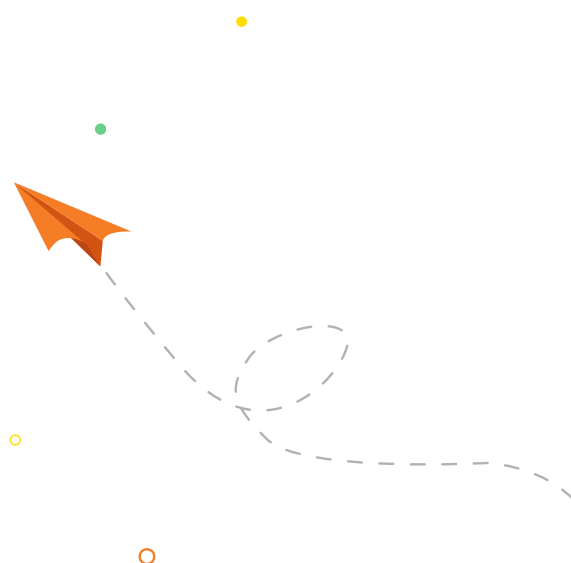
Retailers will never have a perfect customer experience unless sales associate training is given the attention it deserves.

Fix

Reformat Training Materials So That Store Teams Can:

- ▲ Complete training modules in small, manageable chunks.
- ▲ Access training when they're on the go (hint - while they're on their mobile phones).
- ▲ Gauge their progress on a continuous basis.
- ▲ Make training fun and engaging for sales associates, giving them motivation in the form of gamification and recognition for their achievements.

This applies not only for new employees, but for seasoned ones as well. Learning is continuous.



*Skipton Building Society, December 2017

01

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

Conclusion

“If you can’t measure it, you can’t improve it.”

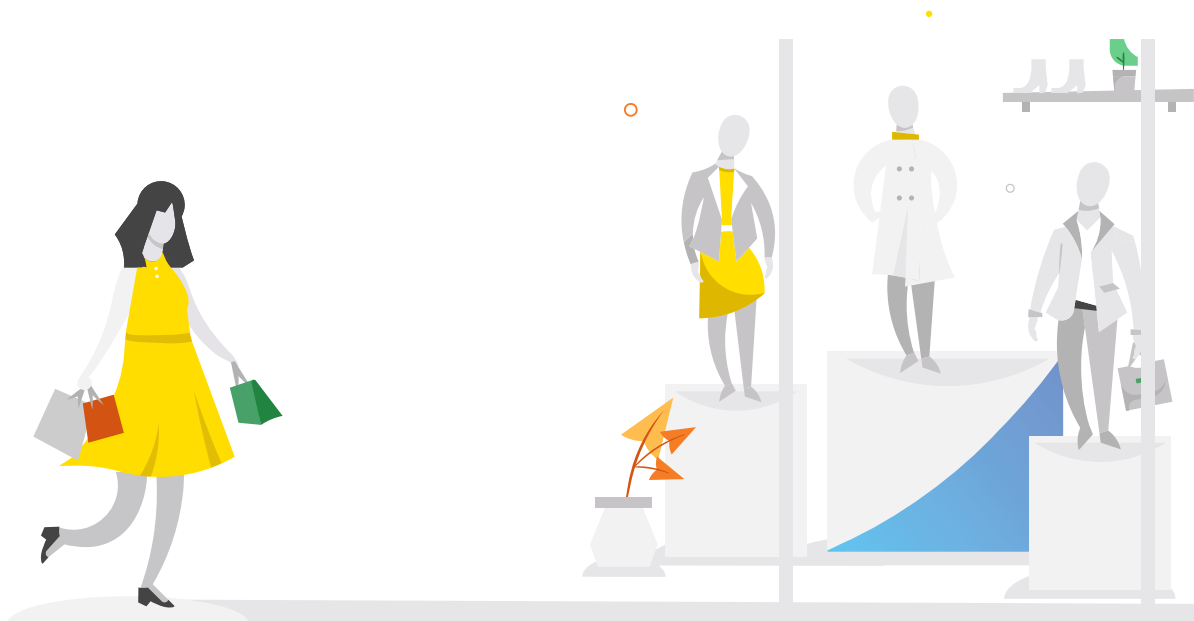
It’s the measuring part that’s holding retailers back.

Stores don’t exist only to sell products.
That’s online’s job.

Stores exist to immerse a customer in a brand.
Stores exist to inspire, help and delight.

What makes a store all 3 of these things? It’s how the store looks.
It’s how the store feels, and it’s how the people working inside treat you.

So to stay relevant, start measuring how stores make exceptional customer experience a reality. Only then is meaningful improvement possible.

**01**

Introduction

02

Gap #1

03

Gap #2

04

Gap #3

05

Conclusion

About YOOBIC



YOOBIC is an all-in-one platform that helps retailers perfect in-store operations, maximize team productivity, and unify all communications to deliver an irresistible customer experience and increase conversions. With YOOBIC's In-Store Conversion Optimization, retailers finally have the agility they need to deliver the ultimate shopping experience that customers just can't resist.

Operational Excellence

Gain full visibility of your in-store execution, measure performance easily, and streamline all your daily processes.

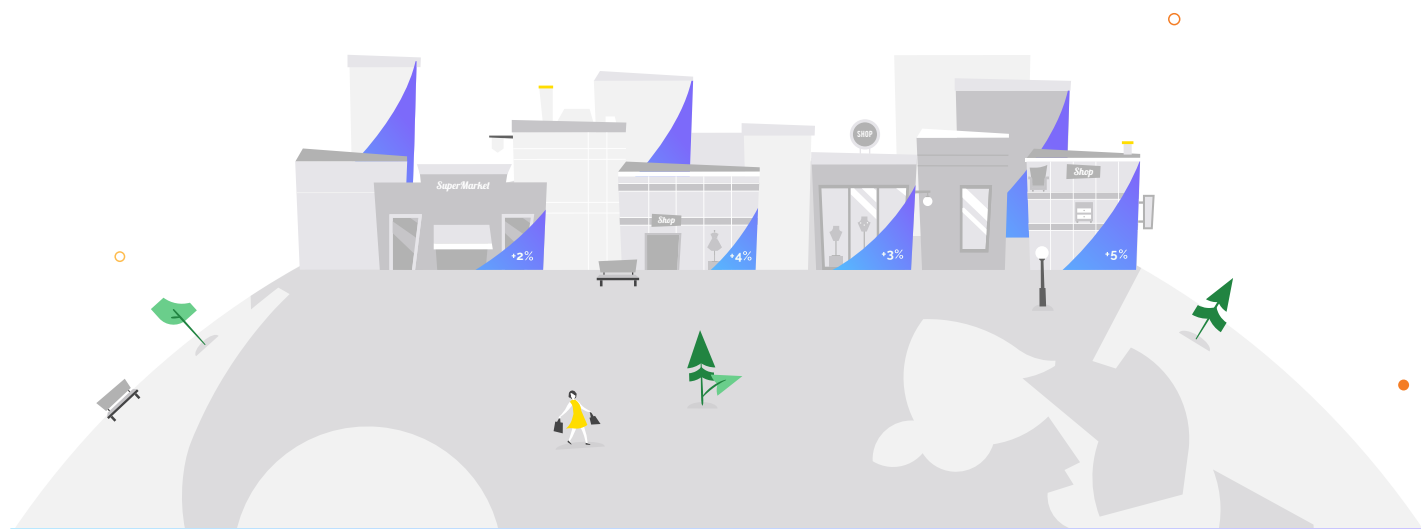
Enhanced Collaborative Training

Strengthen your teams through interactive training, performance incentives, and collaborative learning.

Unified Communication

Have your associates more connected, engaged and informed through one unified communication channel.

Trusted by over 100 retailers around the world including Lacoste, Peugeot/Citroen, and Halfords, YOOBIC's In-Store Conversion Optimization platform has increased their conversion rates by up to 22%!



Interested? Get in touch to learn more about YOOBIC and get a demo:

www.yoobic.com/demo