



Retail Curriculum



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Introduction

In May 2018, Community Literacy of Ontario received funding from the Ministry of Training, Colleges and Universities to support curriculum enhancements for Literacy and Basic Skills agencies.

Through discussion with the CLO Board of Directors and various program staff, through exploring labour marketing information, and via our experiential learning research, the importance of developing occupational curriculum was strongly identified. Further, this type of curriculum is often highly popular with learners and useful for literacy practitioners.

We researched curriculum gaps and areas of high demand from learners and practitioners. As a result, CLO worked with four community-based LBS agencies, who have extensive experience in developing occupational curricula, and developed the following curricula:

- **Clerical and Office Administration** (Kingston Literacy & Skills)
- **Food Counter Attendants & Kitchen Helpers** (Connections Adult Learning)
- **Health Care Preparation** (Brant Skills Centre)
- **Retail** (Sudbury Vocational Resource Centre, Educational and Workplace Training Program)

These curricula are now freely available on CLO's website at:
www.communityliteracyofontario.ca/resources/publications/#Curriculum

Our curriculum development team members are excited to have this opportunity to support adult learners and LBS programs! We sincerely hope that these curricula are helpful to you in the important work you do.



About Community Literacy of Ontario

Community Literacy of Ontario (CLO) is a provincial literacy network of 100 community-based literacy agencies located in communities large and small across Ontario. You can learn about CLO and access our amazing resources at: www.communityliteracyofontario.ca/.



About the Educational and Workplace Training Program of the Sudbury Vocational Resource Centre

The Educational and Workplace Training Program, is as a key part of the Sudbury Vocational Resource Centre. It provides a broad array of educational and workplace training opportunities, including Literacy and Basic Skills training, GED preparation programs, computer skills programming and more. The Educational and Workplace Training Program has extensive experience in developing and delivering occupational curriculum to adult learners.



Thank you to Literacy Link Eastern Ontario

Community Literacy of Ontario is honoured to express its deep thanks to Literacy Link Eastern Ontario (LLEO) for allowing its “Retail” curriculum to be revised, adapted and updated as part of CLO’s curriculum project.

We are immensely grateful to Doug Noyes, LLEO’s Executive Director, for his strong support. Literacy Link Eastern Ontario has in-depth experience with creating occupational curricula and is considered as a strong leader in this area.

Over the past years, LLEO has been involved in developing occupation-specific curricula for adult learners. In fact, Literacy Link Eastern Ontario has developed over 18 different occupational curriculum. As a network and a region, LLEO is proud to have developed valuable curriculum resources for LBS learners across the province





Retail Curriculum

Module 1

What Does It Mean To Be A Retail Associate?

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

Unit 1 – Introduction

Today's retail associate is much different from the retail associate of even 10 years ago. Not only must an associate practice the time-honoured values of etiquette, politeness, enthusiasm and willingness, they must also be technologically savvy and be able to perform many different tasks and duties related to computers and computerized sale systems. Searching for items on the Internet, looking up stock or items in a database, and operating a point of sale cash system are just a few of the duties that almost every retail and customer service associate must be able to do in an ever-changing retail environment.

Friendly, sincere and enthusiastic customer service is also a very important skill in any retail position. Consumers spend millions of dollars every day on merchandise. Often, feelings and opinions that a customer has about a store are formed by the dealings they have with the staff. This is why acting in a professional way, and providing sincere and helpful customer service are such important skills to have as a retail associate.

For example, if a customer wants a particular product which is not available on the sales floor, a successful retail associate would offer to check the back stock room, call a partner store or place a special order for that customer.

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

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

Multi-tasking:

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

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

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

- Customer service
- Decision-making
- Looking and acting professionally
- Oral communication
- Organization
- Multi-tasking
- Problem-solving
- Time management
- Use of technology
- Working in a team setting
- Working independently in a structured environment



A typical retail associate's day will involve some or all of the following tasks:

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

Training and Qualifications to Become a Retail Associate

Some employers ask for a high school diploma or the equivalent. Most importantly, employers look for people who are able to work well with others, are friendly and upbeat, can work on their own in a structured environment, have a strong work ethic and a positive attitude, have a neat and tidy appearance, are able to communicate well with others, and are curious and eager to learn!

The training that an associate receives in a new retail position depends on the size of the retail operation where you work. If, for example, you begin working in a small health food store, your training will be fairly short.

Training will likely involve a couple of shifts either working together with the owner of the store or an experienced associate to understand how to use the cash register, how products are merchandised, how the back room is organized, etc.

After a couple of days of watching how things are done and some hands-on practice, the owner may decide you are ready to dive right into the job! During this time, it is important to ask questions about parts of the job you may not be certain of or that you need further training in. Most employers can tell when they have an eager and enthusiastic new employee, and will appreciate your efforts to learn all about your new job. Never be afraid to ask questions because you will continue to learn every day on the job.

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

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

In today's online world, you will also need to know how to search the Internet and look up items on different websites, or order items on the store's computer system. Having knowledge about technology is definitely required in today's hi-tech world.

The seven modules covered in this curriculum are:

1. What Does It Mean To Be A Retail Associate?
2. Customer Service
3. Retail Math
4. Tools of the Trade
5. Store Procedures
6. Health and Safety
7. Wrapping It Up!

There are different learning activities in each module that will let you work through what you are learning. These activities are your chance to show off what you have learned. You are asked to write in complete sentences and check for correct spelling and grammar. This is what is expected of you when you are on the job!

Remember:

- Ask questions
- Answer in full sentences
- Read carefully
- Be creative
- Give your best effort!

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

Good luck and let's begin!



Learner name: _____

Retail Training Student Record

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

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Introduction		
Overview of the World of Retail		
Attitude and Appearance		
Team Work		
Communication Skills		

Module 2: Customer Service

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Commitment to Customer Service – Part 1		
Commitment to Customer Service – Part 2		
Telephone Service		
The Upset Customer		

Module 3: Tools of the Trade

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Introduction		
Calculators		
Cash Registers/Point of Sale		
Computer Basics		

Module 4: Store Procedures

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Common Work Tasks		
Store Maintenance		
Schedules, Payroll and Other Forms		
Store Policies and Procedures		

Module 5: Retail Math

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Money Math		
Cash, Credit and Debit Cards		

Module 6: Health and Safety

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Know Your Rights!		

Module 7: Wrapping It Up!

<i>Unit</i>	<i>Date</i>	<i>Mark</i>
Personal Plan		

Learning Activity #1

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

1. What is an example of a retail position in which you would be interested?
2. What is one important skill you need for customer service? Why is it so important?
3. Name an important task you will be doing when working in customer service. Why is it so important?
4. What are some retail positions where you could see yourself working?
5. Write about a time when you had bad customer service.
6. Think of a situation where you thought, "Gee, that person is a really great salesperson." What made her/him so great?
7. What parts of the retail essential skills training interest you the most? Explain why.

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

a. ____ Positive Body Language

b. ____ Communication Skills

c. ____ Personal Hygiene

d. ____ Customer Service

e. ____ Time Management

f. ____ Dress Code

g. ____ Appearance

h. ____ Attitude

1. Personal cleanliness
2. Connecting either verbally or non-verbally; e.g., a greeting or smile
3. An opinion or way of thinking; e.g., being positive
4. How a person appears to others, an impression or image
5. Body movements that send a positive message; e.g., nodding or smiling
6. Effectively organizing one's time
7. The appropriate style of clothing for a specific place of work; e.g., trousers and a jacket
8. Providing goods and services in a way that exceeds the customer's expectations

Unit 2 – Overview of the World of Retail

*Parts of this section have been adapted from: **Steps to Employment in Ontario**. Material reprinted, cited or adapted with permission from LRCT Consulting, Toronto, ON.*

Employers

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

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

Types of Retail Stores

There are a number of different types of retail stores. There are large box stores, stores within a mall or shopping complex, stores that sell one particular item, and there are even stores that sell all of their items at a discount.

Retail:

The sale of goods to the public in large or small quantities for use or consumption.

The next time you go shopping, look around at all the different types of stores there are to choose from. Look at the sizes of the stores, the advertising and the layout of the stores. You will see that each store has its own unique features and style.

Learning Activity #2

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

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

a. ____ Kiosk

b. ____ Department store

c. ____ Franchise

d. ____ Specialty store

e. ____ Retail operation

f. ____ Discount store

1. A store where goods are priced at less than the retail price. Usually considered a low-end store.
2. Any business that sells to the public at retail prices.
3. A store that carries a wide range of goods in several departments. The goods are usually mid-range in quality and price.
4. A very small retail operation usually found in the centre areas of shopping centres. They often look like wagons and can be easily moved.
5. A business that is owned by an individual but products and marketing are done by the original company. Pizza Pizza is one.
6. Offers items that are one type. A store could offer sports equipment or plus-sized women's clothing.

2. Give an example of three types of stores listed in Activity #2.
3. Name one of your favourite stores that you shop at often. Why is it your favourite? What kind of goods does it sell?
4. Is there a store that you do not like shopping at? Why? What could make that store better?
5. Work with a partner and go to two of the websites for stores in your community. Do these stores have catchy, attractive pages? Are they easy to navigate? Is the contact information (phone number, email) easy to find?
6. Stores depend on their advertising to get customers, and to try to be different from other stores. Complete the following sentences.

In our/my opinion, a store like _____ has great ads because

Our/my favourite online store is: _____

7. Now, name three things that you or someone you know has bought on the Internet. Name the store or the website, and the item that was purchased:
 - 1.
 - 2.
 - 3.

Working Conditions in Retail

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

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

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

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

Quota

The number of goods sold or sales to be reached in a certain time period.



Learning Activity #3

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

Positive...Pros	Negative...Cons

The Pros and Cons of Working in Retail

2. What are the differences between these methods of payment? If you are unsure, look in the dictionary or on the Internet, and write the meanings here.
 - Hourly Wage:
 - Salary:
 - Commission:

3. Find out the wages offered in retail positions. Look at job ads on the Internet through job banks and on other sites that list places that are hiring.

Job Position	Wage

4. Match the job titles below with the appropriate task in the box.

- a. Promotion and marketing staff
- b. Sales associate
- c. Customer service associate
- d. Special services associates
- e. Department manager
- f. Buyer
- g. Returns desk associate
- h. Cashier

1. handles all customer returns and exchanges
2. responsible for maintaining customer's satisfaction
3. seeks out and purchases goods for retail operations
4. sells directly to the customer
5. supervisory position, responsible for all areas of one department
6. responsible for all special orders
7. handles money transactions
8. thinks up ways of bringing the company to the attention of potential customers

The Two Major Sectors of our Economy

Our economy is divided into two major sectors: **the production sector** and **the service sector**. The service sector includes wholesale and retail trade, real estate, and vehicle sales. The production sector includes areas such as agriculture, fishing, logging, and manufacturing.

After the production sector has completed making or producing the goods, they are shipped off to the retailer. This is where the service sector takes over.

For example, once a car has been produced in a factory, it is then shipped off to a car dealership to be sold to the public.

Another example is the fish that is caught in the oceans. Once the fish are inspected, they are trucked, shipped, taken by train, or flown to grocery stores or markets where they will be sold.

Learning Activity #4

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

1. What is one example of a production sector in our country?
2. What is an example of a service sector job?
3. What are some products that Canada is famous for producing?
4. Name some items or goods that are produced in large factories:

Trending!

Successful stores and retail businesses have grown through the use of the Internet. Instead of going to busy malls and driving through traffic, a growing number of people prefer to shop from their laptops, tablets, and even their phones.

Most stores that you see in malls or on the streets have websites that list all of their products, and sometimes even more products and items than they actually have in the stores themselves. There are no worries about space or storage on websites or online stores. Page after page of the items, their prices, and descriptions of the products are there at your fingertips. Most sites offer reviews about the products from customers that have purchased them in the past.

Although online purchasing is convenient, there are still some shoppers who prefer to go into a store and see the product for themselves. These types of shoppers would rather touch what they are buying, or try on the clothes that they are interested in. Some shoppers like the social part of shopping as well. They like to chat and interact with the staff, or ask questions if they have any.

Future Trends:

- Spending more time at home
- An aging population
- Wanting time-saving and convenience items
- Concern for quality and price
- Personal services
- Moving from an industrial society to an information society

E-Commerce

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

Will the Internet mean the end of living, breathing salespeople? Does it mean increased opportunities for retailers in world markets? Many companies have an Internet website. They feel it will increase “brand recognition”, that customers will appreciate the convenience, and that their loyalty to a store in a real mall or on a main street will increase. The prediction is that Canadian consumers will continue to increase their online purchases every year.

Learning Activity #5

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

1. What are two convenient things about shopping on the Internet?
2. What are two great things about physically shopping in stores?
3. Have you ever bought anything online? Provide an explanation.
4. Have you ever purchased anything from a website and had a bad experience?
5. In your opinion, what are the differences between purchasing face-to-face and online, or on the Internet? Which do you prefer? Explain why:
6. Name something that people might be afraid of when shopping online.
7. What is something that you would never buy online?
8. What is something that you can see yourself buying online that you have always bought in stores?

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

Interview Questions	Interview #1	Interview #2
Where do you prefer to buy groceries?		
Where do you prefer to buy clothes?		
Where do you prefer to buy furniture?		
Name four brand name items you often buy.		
Have you ever bought anything online?		
Will you buy something online this year? Why or why not?		

Sales occur everywhere and anywhere. “The marketplace” is a term used to describe the commercial world. The following is a partial list of places where individuals buy goods.

<ul style="list-style-type: none">• Mom and pop corner store• An outdoor lot• Door-to-door• Internet• Apps• Amazon• Etsy• Catalogue• Telephone• Markets• Big box store	<ul style="list-style-type: none">• Mail Order• Superstore• Department Store• Mall or Shopping Centre• Street Corner• Kiosk• Wholesale Club• Specialty Store• Chain Store• Factory Outlet• Farmer’s Market
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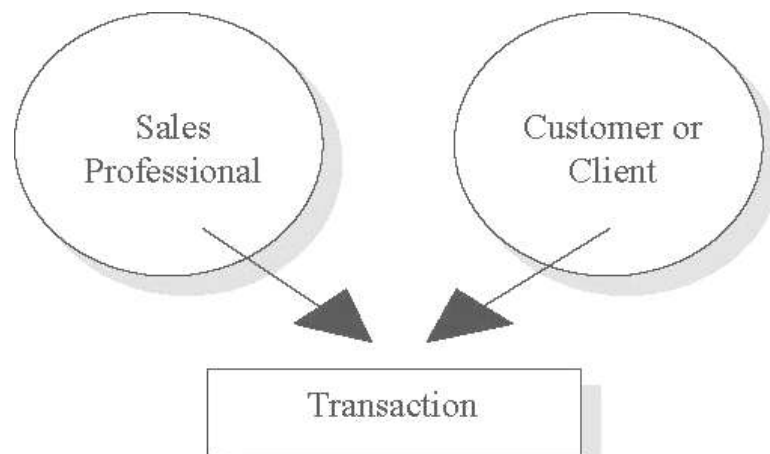
Name two others:



The Sales Relationship

The list of places where sales are made tells us that a transaction can happen anywhere. The relationship between buyer and seller is the important thing. The potential sale is the reason why the sales professional and the customer are together. The physical workplace may be very different. The goods being sold can be cheap or expensive, a large or a small purchase, a practical item or something just for pleasure.

Some goods will need special product knowledge, and some sales are more complicated because there are regulations or legal agreements involved in buying and selling. The relationship between a sales associate and the customer is one of the oldest relationships in history. How that relationship is built, what Canadian customers expect, the style of selling used by the salesperson...this is what defines sales occupations.



Working the Season

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

Another Seasonal Opportunity

Like the holiday season described above, summer also brings increased job opportunities. In Canada, winter is long, cold and snowy. It is more difficult to be out driving and shopping in the winter, so many people take advantage of the warm weather to shop. Companies also need to hire temporary staff to cover regular employees' holidays, since many people go on vacation in the summer.

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

Learning Activity #6

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

1. What do you think makes someone a successful sales professional? List at least three qualities.
2. Look at the chart below. Decide if what is in the column on the left is critical for all retail sales associates to have. Put a yes (✓) or a no (X) in the middle column. In the right column, give a reason to explain your answer.

Skills, knowledge and attributes	Yes / No	Reason
High school diploma		
Excellent ability to deal with customers		
Friendly personality		
Product knowledge		
Good communication skills		
Post-secondary education		
Math knowledge		
Ability to work with others		
Computer knowledge		
Ability to multi-task		

Unit 3 – Attitude and Appearance

Parts of this section have been adapted from: “Customer Service...it’s more than just “Thank you, come again!” produced by Literacy Link Eastern Ontario. Used with permission.

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

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

Professionalism:

- Your approach at work
- Engaging in your work with seriousness and efficiency
- Demonstrated through your attitude and appearance

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

Attitude:

- A feeling or emotion toward a fact or state
- An opinion or way of thinking; e.g., being friendly or helpful



Learning Activity #7

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

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

Circle the number that most closely states what you believe:

- 1** Indicates that you strongly disagree with the statement
- 2** Indicates that you disagree with the statement
- 3** Indicates that you agree with the statement
- 4** Indicates that you strongly agree with the statement

I believe that you must be open-minded and consider the ideas of other staff while at work.	1	2	3	4
I believe that you should treat customers with a positive attitude, regardless of their age, race or appearance.	1	2	3	4
Even on personally difficult days, I should have a pleasant attitude and remain professional.	1	2	3	4
I believe it is important to be patient and a good listener with a difficult customer.	1	2	3	4
I believe it is important to be honest and admit mistakes.	1	2	3	4
I believe it is important to be self-motivated and do things before being asked.	1	2	3	4
I believe it is important to show enthusiasm and excitement about the products I am selling.	1	2	3	4
Being flexible is part of having a positive attitude.	1	2	3	4
Challenges can turn into rewarding opportunities.	1	2	3	4
I believe it is important to be customer-oriented; e.g., helping a customer before stocking shelves.	1	2	3	4

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

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

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

Your Score: _____

Above 32:

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

Between 20 - 32:

You have a few doubts about the importance of professionalism in retail.

Under 20:

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

Bonus Question: Were you surprised with your evaluation? Why or why not?



Your Professional Attitude

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

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

Today is going to be a wonderful day!

OR

Today is going to be a lousy day.

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

See yourself in your mind going through the day with this attitude. Greet your co-workers and customers with a smile and a positive remark. Look them in the eye as you begin the day. As the day progresses, you may find your positive attitude beginning to waver. Perhaps someone has pushed the wrong button. Feelings of anger, stress, and self-doubt can begin to creep into your mind. This is when you need to take a quick break and repeat your positive phrase to yourself. Take a few deep breaths, put a smile on your face, and let the negative thoughts go.

A positive attitude will reduce stress in your work life. Research suggests that as much as 80% of all disease may be because of stress. People bring their home problems to work and their work problems home. The following are directly related to stress:

- Being late
- Staying home from work
- Poor job performance

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

Checklist Before Work:

Did you:

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

Helpful Reminders

- Customers are willing to wait patiently longer if you acknowledge them.
- Your attitude will represent the way your customers see you.
- Customers are the purpose of your work, not an interruption.

Learning Activity #8

Can you think of other tips to make sure that you are all that you can be? Share with a partner, a group, or work on your own and write down any new reminders you come up with.

Remember...put yourself in the customer's position! You would want to be greeted with a smile and be given the best help possible. Sometimes when we reverse the roles, we can get a better sense of how the other person will feel.

- Write one positive and one negative thing you might hear a person in customer service say:

- List five ways you might greet someone who has walked into the store when you are working:

- List five things you might say to someone who is leaving the store:

Customers like to be greeted within fifteen seconds of walking into a store. Just a simple “hello” may be all it takes, since this simple greeting lets them know you’ve seen them and are aware of them. They may ask you a question right away, or they may want to shop around on their own first. Either way, they know you are there to help them.

Rate Your Self-Confidence

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

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

Learning Activity #9 – Rate your self-confidence.

Circle the number that corresponds with what you think.

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

I will be able to approach customers with ease.	1	2	3	4
I have a quick, easy smile.	1	2	3	4
I always speak first.	1	2	3	4
I look forward to meeting strangers.	1	2	3	4
I enjoy walking into new social situations.	1	2	3	4
I always look my best for my job/situation.	1	2	3	4
When required, I can easily interrupt a conversation.	1	2	3	4
It is natural for me to be friendly and open.	1	2	3	4
I am secure inside.	1	2	3	4

1. Choose one item that you strongly agree with and can do with ease. Explain why:
2. Choose one item you may need to work on and find difficult to do. Explain why:

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

Your score: _____

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

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

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

Bonus Question: Were you surprised with your evaluation? Explain your thoughts about the quiz you just finished.

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

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

What Makes a Positive Personality?

Appearance

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

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

Confidence

There are two kinds of confidence.

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

External:

- Coming from an outside source
- Based on a surface or superficial level

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

Internal:

- Coming from an inner source
- Based on a personal or soulful level

Creativity

Creativity is the ability to think around and beyond the obvious to solve problems. Creative people think about problems as challenges, and find ways to come up with new and exciting solutions. Creativity shows that you can think of new ideas and can create new solutions that are above and beyond the “norm”. Even if your creative idea doesn’t work, at least you’ve put forth an effort and have shown that you’ve tried.

Determination

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

Enthusiasm

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

- | | |
|--|---|
| <ul style="list-style-type: none">• Zest for living• An interest in many things• Curiosity | <ul style="list-style-type: none">• A high energy level at work and in life• Great eagerness |
|--|---|

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

Imagination

Using your imagination and picturing yourself in positive situations is a wonderful characteristic to develop. Through using your imagination, you can create the person you most want to be. Feeding this image into your mind every day influences who you will become. You will get closer to that image. In time, and by developing the above qualities, you will be able to live your life s you “dream” it. You can use your imagination to build your self-confidence.

A positive personality is very powerful. It is a combination of creativity, determination, enthusiasm and imagination. Continuing to develop these parts of your personality will increase your internal and external confidence.

Making customers happy is the best way to stay happy yourself!

Learning Activity #10

Look at each item in the list below and give an example or situation of each. Try to imagine yourself at work for each item listed.

- Appearance:
- Confidence:
- Creativity:
- Determination:
- Enthusiasm:
- Imagination:

Communicating Your Best Image

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

Three reasons to take a new look at your image:

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

A Note on Cell Phones, Texting and Social Media

Cell phones, texting and use of social media should not occur at work. Your phone should be kept in a safe place and not be on your body while you’re working. You can check your phone on your break or at lunch, but texting or talking on the phone while you are on your shift is something workplaces (and customers) frown upon.

Therefore...

Talking on cell phones and texting when other people are present, especially customers, is rude. You are not giving others the time and attention they need, and you won't be able to concentrate on your job...which is helping customers!

Perfume and Aftershave: Yes, it smells nice, but...

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

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

The following items are usually scented:

- Soap
- Shampoo and conditioner
- Hair gel
- Body spray and perfume
- Shaving cream and aftershave

When these scents get mixed together, a whole new scent is created. If they were mixed in a laboratory, they probably wouldn't smell very nice, and you probably wouldn't choose to wear it! Keep this in mind when you are getting ready for work.

A Note on Body Odour...

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

Here's the deal...

- You need to shower regularly.
- You should wash your hair at least every other day. Hair picks up odours. Greasy-looking hair is unpleasant to customers and is not professional.
- Brush your teeth regularly.
- Wash your clothes regularly. It is okay to wear clothes more than once if they are still clean looking and clean smelling. Your clothes absorb sweat. If your clothes smell sweaty, choose something else to wear to work.

Being Positive!

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

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

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

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



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

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

Learning Activity #11

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

1. Staying____is better for your attitude than being lazy.
2. Being bored at work can result in a_____.
3. One way to stay positive during quiet periods is to take the initiative and _____
_____work for yourself.
4. Staying____all the time is a big challenge.
5. Gossiping over problems with a co-worker is_____.
6. Negative attitudes chase _____away.
7. Making_____calls on your cell at work is inappropriate.
8. Tidying up is a____way to keep _____when customers are not in the store.
9. A great _____will help you stay positive at work.
10. Texting your friends is_____while at work.
11. Two things you can do to keep busy while at work are:

Unit 4 – Teamwork

*Parts of this section have been adapted from: **Customer Service...it's more than just "Thank you, come again!"**. Material reprinted, cited or adapted with permission from Literacy Link Eastern Ontario.*

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

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

Learning Activity #12

What are five benefits of working as a team?

Learning Activity #13

Choose three tasks you can do in a work setting of your choice. In a group or in pairs, discuss how they would be done as one person and then as a team.

Ideas for a work setting		
<ul style="list-style-type: none"> • Grocery store • Sporting Goods store • Coffee shop • Department store • Dollar store 	<ul style="list-style-type: none"> • Lawn Care Service • Laundromat • Restaurant • Arena staff • Computer store • Junkyard 	<ul style="list-style-type: none"> • Pet Store • Paint store • Cleaning Service • Convenience store • Hospital • Airport

After you have finished, discuss this activity as a group. What happened?

Teamwork Activity: Making a Sandwich

Materials: Flip chart, whiteboard, markers/pens

- Divide into two teams with one person on Team A and the rest of the group on Team B
- Each team is to write down the steps to make a ham sandwich.
- Each team is given 10 minutes to write down the steps.

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

Before the activity began, what did you think might happen? Did it turn out the way you thought it might? Make notes on your discussion.

Back-Up Tasks

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

Some examples of back-up tasks are listed below:

- Airline attendants clear dishes.
- Servers clean and stock shelves.
- Booksellers stock the shelves.
- Clothing sales people arrange clothing displays.
- Receptionists do filing.
- Bartenders wash glasses.

Learning Activity #14

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

Job	Back-Up Tasks
Working in a museum	Restocking pamphlets at the museum's display rack

Customers Should Always Come First...

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

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

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

Moral:

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

What Qualities Employers Want

Enthusiasm

Employers are looking for people with:

- A high energy level.
- A desire to try new things.
- An interest in many things.

Hard Working

Make sure:

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

Honesty

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

Initiative

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

Loyalty

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

Professional Development

- An employer appreciates an employee who continues to update his or her skills.
- Take advantage of any professional development offered to you.
- The new things you learn will be of enormous value to you.

Stability

- Employers prefer employees who are reliable.
- Frustration and difficult times occur in every job. Hang in through these times, and you will be rewarded when the good times return.
- Leave your personal problems at home. If you are having a bad day, do not take it out on the customer.
- Talk to your supervisor about what is going on, and try to keep your emotions under control while on the job.

Ten Skills for Success

1. Be dependable - put in a full day of work	6. Take pride in what you do
2. Work well with your supervisor	7. Show initiative - learn new skills and take on new tasks
3. Know when to ask questions	8. Look your best
4. Cooperate with co-workers	9. Control your emotions
5. Carry out your responsibilities	10. Become part of the organization

Twenty Ways to Keep Your Job

1. Be dependable	11. Work as a team member
2. Follow instructions	12. Work well under tension or pressure
3. Know what an employer expects	13. Use initiative and imagination
4. Manage time and materials efficiently	14. Make decisions on your own
5. Get along with a variety of people	15. Be neat and clean in appearance
6. Maintain good health	16. Follow safety regulations
7. Be punctual	17. Use information, materials, and equipment appropriately.
8. Adapt to varying work situations	18. Use appropriate communication skills
9. Work without close supervision	19. Use appropriate math skills
10. Be loyal to the employer	20. Support your co-workers

Learning Activity #15

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

- What are five qualities employers look for?
- What are five things that are important for keeping your job?
- What are three things listed in the “*Twenty Ways to Keep Your Job*” list that you’ve had trouble with in your past jobs? How will you work on these skills in your next job?

Team Meetings

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

Teams meet to:

- Update the staff on new procedures, trends and needs
- Find ways to continue to improve performance
- Find ways to solve problems
- Motivate and involve everyone



The importance of teams:

A team has: <ul style="list-style-type: none"> • A common goal • A need for each member • Awareness that they are a team • A shared way of doing business • To work together part of the time • The ability to get more done by working together than working on their own 	Try to: <ul style="list-style-type: none"> • Understand everyone's role and respect it • Discuss matters with your team if you don't agree • Help out when you can • Make suggestions to the team to make it better • See if you can grow your team
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As members of a team, we need to: <ul style="list-style-type: none"> • Learn to speak up in groups • Take responsibility for our own actions • Learn to give our opinion • Say no when necessary • Receive and respond to criticism • Make requests • Negotiate for something we want 	Teams work well because: <ul style="list-style-type: none"> • More gets accomplished in less time • You feel a sense of comradery • You see things differently • You learn from others • You make friends easier
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Learning Activity #16

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

Teamwork Pros and Cons

List three pros and three cons (the reasons for or against) about working as a team.

Teamwork Case Study

In a group, read the following case studies and choose one. Appoint a manager, recorder and timekeeper. There should be at least four to seven people in your group. You are the team that has come together to solve the problem. Decide on a presenter who will talk about the process you followed in your meeting, what the problem was and what you as a team decided to do.

Case Study 1:

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

Case Study 2:

A large department store chain has earned a reputation for poor customer service. Management has put together a work team of supervisors and front line sales staff. They have a day of paid time to come up with new ideas for better customer service.

Your response to the Case Study:

- Write down any communication skills that you noticed in the team meeting.

- What ideas and solutions did your team come up with?

- How did working in a team make responding to the Case Study easier (or harder)?

Asking for Clarification

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

Clarification:

To make clearer; to ask for further information

Learning Activity #17

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

1. In this exercise, a supervisor is telling you about the new policy of carrying a walkie-talkie when you are working. You have questions about what to do if your manager or supervisor begins to talk on it and you are with a customer. Do you stop what you're doing with customer and respond to the walkie-talkie? What about when you are on your lunch break? Work with a partner and create a discussion between you and your supervisor using the following language:
 - I'm sorry, could you...
 - Let me clarify; I heard you say...
 - I'm not sure what you mean...
 - Can you suggest...
 - What if...
2. Think about the workplace today. It is constantly changing. Does the saying below suggest anything to you?

**"Don't put off until tomorrow
what you can do today."**

Source: Benjamin Franklin

3. How does the statement above relate to the retail workplace?

4. Visit a local retail store and look around. Observe how the staff works with each other, and how they handle the customers. Are they being helpful? Are they being friendly and approaching customers? Jot down your observations on the lines below. What do you think they could do differently?

Features of Teamwork

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

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

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Learning Activity #18

1. List five features that you would like someone on your team to have when you are working with them.

2. Your co-worker is serving a customer, but the customer doesn't seem interested in dealing with that particular co-worker. You have helped this customer before and have built a good relationship with him. What should you do?

3. You work in a clothing store and are teaching a new member of the staff how to set up the front window display. You have asked her to put in the store's best-selling line of tank tops and jean skirts. She does a great job of displaying them in an appealing and attractive way, but you notice the brand name and sale price on the jean skirts can't be seen from the outside. This is important for the display because customers will be able to identify the brand name and great selling price at your store. What should you say to the employee?

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

Unit 5 – Communication Skills

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

When you speak in a firm yet co-operative manner, you leave a very different impression than when you speak in an argumentative or competitive way. The words you choose to communicate ideas or feelings can make the difference between beginning an argument or beginning a discussion.

The following are types of statements that will start positive discussions:

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

The following are types of statements that will start arguments:

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

Listening Skills

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

Focus Your Attention

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

Tune in to Understand

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

Ask for More Information or Opinions

- Encourage the speaker to tell you more by asking questions.
- Wait for a pause, and do not interrupt.
- Ask for his or her opinion to make sure you understand what he or she is telling you.

Keeping Cool Under Pressure

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

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

Important!

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

Communicating Clearly and Hearing Feedback

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

- See it as important information about how to do your job and not about you as a person. Do not see it as a personal attack on you. Try to remain objective.
- Take the information and act on it! Do everything possible to improve your performance in that part of your job, until you can do it really well.

Common Thought:

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

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

Common Thought:

"It is easier to do my work and my co-worker's work as well, than to ask her to do her share. I don't want word to get out that I was making any demands on her. People will think I am just complaining or being unfair."

The truth is you should not be doing the work of two people. Also, you cannot control what other people think. You have the right to expect your co-worker to do her part of the job. Talking to your co-worker about this may not be easy, but it is worth the effort to solve the problem. It may be a good idea to go to your manager first with a clear list of what you have been doing that is actually your co-worker's responsibility. Remember: do not sound defensive or angry. Talk about it as a concern, and remain clear and on track.

Learning Activity #21

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

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

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

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

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

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

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

Communication Skills Are Essential in Retail!

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

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

- Create a positive mindset. Change negative or pessimistic words like “rough”, “hard”, “tough” and “difficult” with positive ones like “rewarding” and “challenging”.
- Avoid using extreme words like “best”, “worst”, “always” and “least”, unless you can prove them. Change them to words like “frequently”, “rarely” and “usually”.
- Learn a company’s unique terms, key words, and short terms, and drop them into your conversations.
- Try to sell your product or service by playing up your customer’s interests or hobbies.

Learning Activity #22

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

1. Why do sales associates need excellent communication skills?
2. Can you think of another piece of sales advice that was not mentioned?

Learning Activity #23

Think about effective communication practices. Decide what is wrong with these sales pitches. Then, rewrite them using the advice shared on the previous page. Remember to use complete sentences and check for spelling and grammar!

1. In a small health food store:

"A lot of people don't know this, but ours is the best green tea you will ever try. Much better than Mary's down the street."

This statement is inappropriate because:

A better way to communicate with a customer would be:

2. In a sporting goods store:

"These shorts will make you look good even before you get into shape. Try them on and you'll see how they can disguise anything!"

This statement is inappropriate because:

A better way to communicate with a customer would be:

Wrapping it Up!

Communication skills are critically important skills. Improving communication skills, for most of us, is a lifelong journey.

Learning Activity #24

Search the Internet and find several resources on building effective communication skills (this could be articles, tips, videos, podcasts, etc.).

Based on what you find on the Internet, and on the tips and resources we've shared in this module, make a list of five strategies you could follow to improve your personal communication skills.

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 1

- A. Find and Use Information – A1.1, A2.1, A1.2, A2.2
- B. Communicate Ideas and Information – B1.1, B3.1a, B3.1b, B4
- D. Use Digital Technology – D.1

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Retail Curriculum Module 2 – Customer Service

Module 2 – Customer Service

Unit 1: Commitment to Customer Service - Part 1

Parts of this Unit were adapted from “Customer Service...it’s more than just “Thank you, come again!”, produced by Literacy Link Eastern Ontario. Used with permission.

Why do you need Customer Service Skills?

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

So What Is a Customer Service Professional?

- Customer: a person who buys goods or services from a shop or business
- Service: work, or the doing of work for another, or for the community
- Professional: belonging to, or connected with a profession, skillful, competent, engaged in a specific activity as one’s main paid occupation.

(Source: The Oxford Dictionary of Current English, 2nd edition, 1993)

Learning Activity #1

In your opinion...

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

- What is customer service?

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

- What are some words you think of when you hear the words “bad customer service”?
- Why do you think customer service skills are so important in today’s job market?

Customer Service is Like Baseball...

- A. It is possible to do everything right and still not win.
- B. Your batting average will increase if you cover all your bases.
- C. When customers return because they have been treated well, YOU SCORE!



Bases

1st base → send a positive attitude to others

2nd base → identify the needs of your customers

3rd base → provide for your customers’ needs

Home Plate → the customer returns!

Learning Activity #2

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

To be a Customer Service Professional, you should:

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

Learning Activity #3

- Discuss the above list in pairs, a group, or work on your own. Is there anything you would add to the list?

- What can success in customer relations do for you at your job?

The Personal Benefits of Developing Good Customer Relations Skills

In addition to the money you will make from your job, success in customer relations can do many personal things to help you. Review the statements below. Place a check beside those that you think are true, and an **X** beside those you think are false statements.

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

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

_____ Few executives start out in customer service jobs.

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

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

_____ In your first customer service job, what you learn can be as important as what you earn.

_____ Customer service work is less demanding than other jobs.

_____ A smile uses fewer muscles than a frown.

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

Learning Activity #4

Most people remember a time when they encountered bad customer service. Two examples are a rude waitress or a salesperson that ignores you. Explain about a situation where you experienced bad customer service. Write in sentence form, using the list below.

1. Type of business: (for example: retail, restaurant, gas station)
2. The situation:
3. How I felt:
4. How I handled the situation:
5. The effects of poor customer service:

As consumers, we have all encountered excellent customer service. Unfortunately, we don't often give it the same attention, or tell our friends or post on social media about it, as much as poor customer service. Write about a situation where you encountered good customer service. Write in sentence form, using the headings below.

1. Type of business: (for example: retail, restaurant, gas station)
2. The situation:
3. How I felt:
4. How I handled the situation:
5. The effects of great customer service:

The Secret of Good Customer Relations

Below are ten secrets for creating good relationships with customers:

1. You get back the kind of behaviour you send out.

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

2. You never get a second chance to make a first impression.

Unfortunately, negative first impressions are hard to overcome.

- Those who are good at customer relations are constantly alert when customers come into view.
- They rely on:
 - friendly non-verbal signals
 - warm verbal greetings
- Make sure your first impression does not require a difficult repair job at a later date!

3. Customer service experts are made, not born.

- Everyone has the potential to be good at customer relations.
- All it takes is:
 - a desire to serve
 - training
- Stick with it, and you will learn to excel.

4. You have the right stuff.

- There is no such thing as a specific personality that will make you outstanding at customer service.
- Everyone can smile and be polite and have a good service attitude
- No matter what it is, your special personality is all that you need. Learn to use the “stuff” you already have.

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

- An inferiority complex is the feeling that you are not as good as other people. You feel that other people are better than you.
- When you start to lose confidence, remind yourself that you have unique gifts and skills that are important too.

6. *Select a good role model.*

- Once you are familiar with your new job, find a co-worker who is outstanding at customer service.
- Model some of your actions after this person.
- You might even ask this person to help you.

7. *Make the most of your own special personality.*

- Customers will probably respond positively to any unique differences that make you who you are.
- Your customers and your boss want you to be yourself. Customers may see what you feel is a disadvantage as an advantage.

8. *When approaching a customer, respect their personal space and allow the customer to become comfortable with you.*

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

9. *Consider yourself on stage.*

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

10. *A customer will notice how staff members treat each other.*

- If there are problems between co-workers, these will spill over to customers through attitudes and in other ways. The way to be good at customer service is to be good as a team member. This means being friendly, helpful and cooperative with your co-workers whether they are your favourite people or not. You cannot be angry with a co-worker and friendly with customers at the same time.

Good Customer Relations = Good Business

Serving Customers with Disabilities

One out of seven people in Ontario has a disability! Fortunately, companies are becoming more aware of, and sensitive to, the needs of customers with disabilities. Your employer will likely have policies for ensuring that customers with disabilities receive the accommodations they need and the services they deserve. Here is a helpful website to visit to learn more: www.aoda.ca/how-to-make-customer-service-accessible/.

Customer Service and Social Media

People often share stories (and sometimes pictures or videos) of good and bad customer service via social media and online reviews. Great damage (or benefit) can occur when this happens. We live in a world where customer service is under scrutiny like never before!

Social media gives everyone a HUGE platform to state their opinion. Word can spread in a matter of seconds through the internet; so what you do or say, and how you act are extremely important. When something goes “viral”, literally the whole world can read about, or even witness the event. Be cautious, careful and safe!

Customers: The Four Basic Needs

A customer needs to:

- Be Understood
- Feel Important
- Feel Comfortable
- Feel Welcome

Three Types of Customer Service

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

Type I – Rude Service:

The first type of customer service is rude. You know when you are getting rude service. This happens when the sales associate treats you like you are an inconvenience to them. If they make a mistake, they make you feel like you caused it. If you ask a question, they look at you as if to say, “How dare you disturb me?” They are the associates lounging on the counter, talking to their friends, or staring at their cell phone, ignoring you.

Your goal: never slip into rude service, no matter how difficult the customer or how bad a day you are having.

Rude service means the customer may take their business elsewhere.

Type II – Indifferent (they don't care) Service:

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

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

Type III – Hospitable:

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

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

If the customers come back, you are doing an excellent job.

Learning Activity #5

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

- What are the three types of customer service? Describe how it feels when you are a customer and experience each type of service.
 - 1.
 - 2.
 - 3.
- If possible, find a partner and talk about the following question. If not, work on your own. List some examples of rude or indifferent service. Check each item on your list as either indifferent or rude by marking it with an X. Present your ideas to the larger group. One example is done for you.

Customer Service “Don’ts”	Indifferent	Rude
Don’t eat while you are serving customers.		X

The Six “Don’ts” of a Customer Service Professional

1. <u>Don’t</u> ...	Keep customers waiting
2. <u>Don’t</u> ...	Play favourites.
3. <u>Don’t</u> ...	Give directions in an abrupt, negative manner.
4. <u>Don’t</u> ...	Talk about personal or job-related problems in front of
5. <u>Don’t</u> ...	Allow customers to leave feeling unhappy.
6. <u>Don’t</u> ...	Be occupied by your cell phone when dealing with a customer.

- **Don’t keep customers waiting needlessly**

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

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

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

- **Don’t play favourites**

It is a serious mistake to treat one customer better than another. For example, customers waiting in line at a cash register can see how a sales person treats those ahead. When their turn arrives, they expect to be treated in the same way. Playing favourites with customers is not a good strategy.

- **Don't give directions in an abrupt or negative manner**

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

- **Don't talk about personal or job-related problems in front of customers**

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

- **Don't allow customers to leave feeling unhappy**

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

- **Don't be occupied by your cell phone**

It is important to give your customer your full attention when serving them. They may have important questions about a product, or they may be returning something and are explaining why. If you have your cell phone with you and you are receiving texts or phone calls, this takes away from the attention you need to give to the customer.

You should give your customer 100% of your attention and listen closely to their questions. Lead them to the part of the store they need to go to, explain about a product or service wholeheartedly, and make sure they leave the store satisfied and content.

The Five “Do’s” of a Customer Service Professional

- | | |
|----------|--------------------------------------|
| 1. Do... | Acknowledge the customer |
| 2. Do... | Focus your attention on the customer |
| 3. Do... | Put the caller on hold |
| 4. Do... | Use the customer’s name |
| 5. Do... | Thank the customer |

- **Do acknowledge the customer**

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

- **Do focus your attention on the customer**

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

- **Do put the caller on hold**

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

- **Do use the customer’s name**

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

- **Do thank the customer**

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

Learning Activity #6

1. What are the six don'ts for a customer service professional?
2. What are the five "do's" for a customer service professional?
3. It is the little things that you do as a retail associate for the customer that will bring the customer back. If you give the customer something "extra", they will usually return to your place of business and seek your help again.

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

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

Sales associates could:

- _____ Show a sense of humour.
- _____ Give you directions correctly and pleasantly.
- _____ Treat you in a courteous manner.
- _____ Give you their complete attention when you talk.
- _____ Recognize your presence when you first appear.
- _____ Make you feel important.
- _____ Do something special like seating you at a table, helping you with your coat, etc.
- _____ Follow through and do what they said they would do.
- _____ Treat you with respect and dignity without becoming too personal.
- _____ Pay you a sincere compliment.
- _____ Call you by name.
- _____ Quickly stop routine work or talking with other employees to help you.
- _____ Show patience and understanding when you are undecided or confused.
- _____ Suggest an additional item that you might need or enjoy.
- _____ Make your day more cheerful.
- _____ make you feel better about yourself.

5. Go back to question # 4. Read the list again, and this time check mark the “extras” that you feel you do or could do well. Congratulate yourself for doing them well!

6. Choose three customer service “extras” which you do well and give a personal example of each.

7. Choose three customer service “extras” which you feel you could improve on and describe how you plan to work on these areas in your next job.

“The Nice Customer”

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

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

The other day I stopped at a full service gas station and waited over five minutes before the attendant took care of me. He served others who came in after me. Did I complain about the service? Of course not; I never make a scene. I never nag. I never criticize. I wouldn’t dream of making a scene, since I’ve seen what some people do in public places or online spaces. I think that is uncalled for.

No, I’m the nice customer, and I will tell you who else I am...

I’m the customer who never comes back!

Product Knowledge

As a professional retail associate, your job is to make the buying experience as easy and painless as possible. This will almost guarantee that, when customers want a new product that your company carries, they will come back to your store.

When new products come into the store, it is a good idea to research them and learn as much as you can about them. This is called product knowledge. Product knowledge informs you of how an item operates, what its many uses are, how long it has been on the market and why it is an item in demand. When a customer asks you about a certain pair of shoes, a tool, a video game or the latest cell phone, they will have plenty of questions...they may even ask questions you would never have thought about.

Knowing your product is key. When the customer is informed, they are most likely to purchase your product, and you have done your job!

Learning Activity #7

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

The customer has walked into your store. What does your customer need? What is your job? What do you need to find out and/or do? If possible, work with a partner and make a list. If not, work on your own.

Finding out what the customer's needs are and taking care of those needs is very important. Asking your customer open-ended questions will help you find out what they are looking for.

● WHO?	?	● HOW?
● WHICH?	?	● WHAT?
● WHERE?	?	● WHEN?
● WHY?	?	

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

- Who is the item being purchased for?
- Which brand names do they trust the most?
- How do they plan to use it?
- Where do they plan to use it?

What are the customer's needs?

Picture the customer standing in front of a shelf of 25 different irons that are all different brand names, with different features and different shapes, all claiming to be the iron to buy! If your customer wants an iron, it is your job to find out what the needs are, and narrow the selection down.

What they
want.

Why they
want it.

Learning Activity #8

1. What do you need to consider to help your customer find the right iron? Make a list of the things that you need to consider when narrowing the field for a customer. The price of an item is an example.
2. Choose another item that your customers may want to purchase. Write down a list of things that you will need to know to help them narrow the field.
3. Get into pairs. If this is not possible, then ask your instructor to do this activity with you.

One person will be The Company. The person who is the Company will select one item for this activity. It can be a pen, a water bottle, a cell phone, etc. The Company's job is to sell their selected item to the other person who will be called The Consumer.

The Company is a retail firm. The Consumer walks into the store. The Consumer is the type of customer who wants all the details. The Company's job is to give the Consumer all the details about their item, and to try to get the Consumer to buy the product. Make your best pitch and sell the Consumer your item!

For the Consumer:

Share with your partner: Did the Company know the product? Did they tell you anything that you couldn't see for yourself?

4. Let's do this again... Now switch roles. The new person will be the Company and will now select an item and try to sell it to the new Consumer. Next, discuss the above questions in your new role as the Consumer.

Here's an example of all the details that could be included when selling something as simple as a plastic drinking cup!

I understand that you are thinking about purchasing a set of cups today. Well, our cup is made from durable plastic that has been tested to make sure it will not crack from heat or cold. That means that you can drink hot chocolate or cold milk in this cup. Most plastic cups are designed for cold beverages only. Our cups are made from recycled plastic and are very environmentally friendly!

Who will be using this cup?

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

Do you have a particular colour in mind?

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

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

No?

You'd like a set of 8?

Wonderful choice...now what colour would you like?"

Ask yourself the following question: What are you going to do to "know your product"?

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

Selling Equation: Fact + How it Impacts the Customer

5. Remember back to the many details of the cup and all of the different facts about the cup that were listed. Think of items that you might sell in a store, then fill in the fact section of the following table. When all the facts are listed, fill in the second column of the chart. Remember, this is your “selling equation” while you fill out the chart!

FACT	IMPACT ON THE CUSTOMER
Cup: durable plastic	Will not crack in heat or cold
Pen: ink will not smear	No messy writing or ink smears

6. Think about the selling equation, and how the features of items or services you sell make an impact on customers. If possible work in pairs, if not work on your own. Decide on an item to sell. It can be anything that is a retail item. Write out the facts and how it would impact the customer. Use the table below.

Item we are selling: ____

FACT	IMPACT ON THE CUSTOMER

Unit 2: Commitment to Customer Service - Part 2

Parts of this Unit were adapted from “Steps to Employment in Ontario”, created by LRCT Consulting, Toronto, ON. Used with permission.

Customer Service Tips

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

Do	Don't
<ul style="list-style-type: none">• Practice good listening skills• Make a positive connection• Be honest and helpful• Always follow through on your promises• Keep calm at all times• Be courteous and polite• Make customers feel important• Keep your conversations professional	<ul style="list-style-type: none">• Be overly friendly or familiar• Talk about their or your personal problems• Gossip• Use inappropriate language• Attack when being attacked• Make promises you can't meet

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

Learning Activity #9

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

1. Think back to what you have just learned in **Commitment to Customer Service - Part 1**. What would you add to the list of dos and don'ts above?
2. Use each of the following words or phrases in a sentence. Make each sentence about retail. You can use a dictionary, if you wish. Remember to use the correct form of the verb.

- Talk
- Chat
- Gossip
- Roll your eyes
- Talk non-stop
- Talk down to
- Follow through
- Follow up
- Polite conversation
- Personal problems

What is Customer Service?

Customer service is any contact between a potential customer and an employee. With good customer service, the contact results in a positive experience. Customers want good customer service or, better still, excellent service. They want an employee to listen to them politely with full attention. They want a quick response, but a thoughtful one. They do not want to be ignored or made to wait while the employee is speaking on a personal telephone or sending texts.

Customers want to be helped to reach their goal, whether it is buying a new television or an ice cream cone. Customer service is an essential part of all business and service delivery operations. As a retail associate, every action you make makes a difference to the experience of the customer!

Difficult Customers

Sometimes a customer will give you a hard time. They may be frustrated, or they may have been waiting for a long time because the store is busy, or they may have purchased the wrong product and are on the defensive when returning it. Whatever the reason, you should know that not every customer will be pleasant and easy to deal with.

Listen to the customer and to what the issue is. There may be an easy fix to their complaint, and making them happy is just one step away.

Offer them as many options as possible, within the guidelines of the store's policies. If things still remain heated, it is best to get your manager to talk to the customer. The manager, or even the assistant manager or supervisor, may be able to offer something to the customer to satisfy their need or rectify the situation.

Learning Activity #10

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

1. What are three characteristics of good customer service?

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

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

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

- The customer wants to return a sweater
 - Ask for the receipt
 - Ask for the reason it is being returned
 - It was too large
 - Ask for the customer's information to put on the return form
 - Don't forget to smile and say "come again" or something equally polite
-
- *Customer: Excuse me. I would like to return this sweater.*
 - *Retail Associate: Do you have your receipt?*
 - *Customer: Here it is.*
 - *Retail Associate: Thank you. I need to make note of why you are returning the item.*
 - *Customer: It was really the wrong size...much too big. I didn't try it on until I got home.*
 - *Retail Associate: Oh! We actually just received a lot of beautiful new sweaters this morning and all the sizes are available. If you'd like, after I process this return, I could show you where they are.*
 - *Customer: Sure, I do have a few extra minutes to spare.*
 - *Retail Associate: Okay. Would you please fill in your name and address on the receipt? Thank you. Here is your copy. And I'll show you the new sweaters now!*

Notice that, in the above example, instead of only processing the return, the retail associate showed interest in the fact that the sweater was too large and provided excellent customer service by offering to show her the new sweaters after processing the return.



Now try the examples below. Remember, your aim is to provide excellent customer service! Write out the dialogue you would have with a customer.

<p>A customer wants to make a payment on their credit card</p> <ul style="list-style-type: none"> • Verify the amount and credit card • Give receipt • Talk about the special event in the store...a fashion show • Thank you 	<p>A potential customer is looking in the windows of a car on the lot</p> <ul style="list-style-type: none"> • Greetings • Chat • Product information • Set up a test drive
---	---

Dialogue:

<p>A customer is looking for a new microwave oven</p> <ul style="list-style-type: none"> • Questions about types of microwave ovens • Price range • Showcase the features • Complete purchase 	<p>A customer is making a purchase</p> <ul style="list-style-type: none"> • Asks about discount card • Tell information; 10% off certain items for one year; cost is \$5.00 • Decides to join • Fill out application • Goodbye greeting
---	--

Dialogue:

5. Find a partner and verbally practice the previous dialogues in a role-play.

The Customer Wish List

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

Source: Adapted from sbinformation.about.com

The last word...

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

Learning Activity #11

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

1. Think about a company you have worked for or are familiar with as a customer. Are any of the items on “The Customer Wish List” realistic? Explain why.
2. Do you think the facts in the above box titled “*The last word...*” are correct? Explain why or why not.
3. What impact could these facts have on the company you work for?
4. What can you do as a retail associate to make sure this doesn’t happen?

Essential Task

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

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

- Know your customers' needs. Ask the right questions. Make sure the product or item is right for the customer. For big-ticket (expensive) items, this is often obvious. With a smaller item, for example, a sweater that is the wrong size or colour, staff may make the mistake of thinking it will not cause any harm to sell it anyway. Do you think the customer will return to buy from you again?
- Know your product. Keep up to date with your company's trends and new products that are coming in to the store. It is important to know everything that is for sale in your store. This may take time, but it will help you to be able to help your customer find what they are looking for or need.
- Listen very carefully to your customer. Sometimes you can read between the lines and find out what a customer really wants!

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

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

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

The Four Steps of Selling

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

- Approach the customer
- Discover needs
- Present goods
- Close sale

Learning Activity #12

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

1. What is the essential task of any retail associate?
2. What are three tips to remember in any sales transaction?
3. What are two rules regarding sales transactions?
4. Do you need to tell customers the various rules regarding sales transactions? Explain why this is important.

5. List the ways in which a customer can pay for a purchase. What are some examples of discounts that a customer may be entitled to? (for example, a senior's discount)

6. In your opinion, which is the most difficult step to complete? Explain why.

7. Read the following sentences and circle T for true statements or F for false statements.
 - T F Knowing your product is an important part of the sales transaction.

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

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

 - T F Listening carefully is critical in sales.

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

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

Time Management and Customer Service

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

The First Step

The first step is to **always be on time for work**. It is a good idea to be at work at least fifteen minutes early. Often, the silliest and smallest things may come up just before you go to work, which may lead to being late. Maybe the bus arrives late, or you get a really important phone call that you need to answer, or you get stuck in a snowstorm or you have misplaced your keys.

We have all experienced such things, and the only thing we can do to prevent such mishaps is preparing to begin work early so that, regardless of what “disasters” come our way, we can still arrive at work on time.

Arriving at work on time helps you to focus on what your tasks are for the day, and you will begin your day calmer and clearer.

The Second Step

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

Keep the floor clean and clear of any tripping hazards. Make sure that the customer has an easy path around the store, and that they can see all of the products without any obstructions. Remove any garbage that is left on the shelves. Bringing retail items to the front of the shelves is important. You should always move items to the front of the shelves so that customers can access them better. Fill any “empty spaces” with extra product, or spread your product out. This will keep your store looking neat and tidy.

The Third Step

Keep a list of what you must do during your day. Most companies you work for will have certain tasks which must be completed on a regular basis. For example, a list of which items must be re-stocked each week. Each staff member may be expected to do two jobs from the list one week, and two different jobs on the list the next week.

There may also be very specific opening and closing activities, which must be completed at the beginning of the day and at closing.

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

The Fourth Step

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

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

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



Learning Activity #13

1. What is the first step in time management? Explain the importance of this step.
2. What is the second step in time management? Explain the importance of this step.
3. What is the third step in time management? Explain the importance of this step.
4. What is the fourth step in time management? Explain the importance of this step.

Unit 3: Telephone Service

Parts of this Unit were adapted from “Customer Service...it’s more than just “Thank you, come again!”, produced by Literacy Link Eastern Ontario. Used with permission.

The Telephone

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

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

First impressions are lasting impressions.

When you meet someone for the first time, you leave an impression - good or bad. When you meet someone on the phone for the first time, you also leave an impression. The impression tells the customer something about the company you are representing. The person to whom you are speaking cannot see your facial expressions or read your body language.

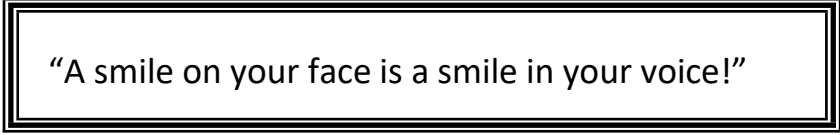
They rely on what they hear to form an impression about you and your company. Your tone of voice, manners, use of words, and speech patterns all help the caller form an opinion of you and the retail company you work for.

You will want to:

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

Be polite and pleasant.

To be sure that you are being polite and pleasant, listen to your voice as you are speaking. Do you sound friendly? Try smiling when you answer the telephone. Just because the customer on the telephone can't see your smile doesn't mean they can't hear it!



"A smile on your face is a smile in your voice!"

Use an appropriate volume.

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

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

Use a moderate rate of speed.

If using the phone is a regular part of your day, you may find that you are repeating the same information several times. It almost becomes second nature, and you can do it without really thinking about it. However, we tend to speed up when we are reeling off information we know so well. We must remember that, even if this is the tenth caller today who has asked when the store opens and closes, it is the first time the caller is hearing the answer.

For example, "*We are open from 9-5 every weekday and 9-9 on Saturdays and Sundays*" is not helpful or sending a positive image of your company. Nervousness can also lead to speaking too quickly. Some people get nervous and rush through the phone call to get it over with faster. They don't like talking to strangers. To help make it easier for you, take a deep, calming breath before answering the phone, and then speak at a moderate rate of speed (normal to slow) when talking to the caller.

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

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

Did you pause when giving information?

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

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

Sound interested.

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

Accent important words.

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

Speak in a calm voice.

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



Learning Activity #14

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

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

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

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

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

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

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

Evaluation Form

Self-Evaluation		Partner's Evaluation		QUESTIONS TO ASK YOURSELF
YES	NO	YES	NO	
				1. Is your voice courteous and pleasant?
				2. Was your voice the right volume?
				3. Was your speaking voice the right speed?
				4. Did you pause when you were giving information?
				5. Did you sound interested?
				6. Did you accent words that needed to be stressed?
				7. Did you speak in a calm voice?

2. Were you surprised by your own evaluation? Explain your answer.

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

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

Telephone Etiquette Helpful Hints:

- Business calls should be made during business hours. The hours vary depending on the type of business, but generally, you should not call someone before 8:30 a.m. or after 8 p.m. Avoid making calls during mealtimes.
- When placing a call, give your name to the person who answers the phone.
- When you are calling someone who is at work, even if your call is work related, keep your message short and to the point. Respect the fact that their time is valuable and try not to take up large chunks of it every time you call.
- When answering calls, don't let the phone ring more than 3 times.
- Tell the caller who you are when answering the phone. For example, "*Camden Books, Wanda speaking*".
- Avoid distractions. Don't try to do other things while you are talking to a customer. Just because they can't see you doesn't mean that they can't sense that you are not giving them your full attention.
- Do not eat, drink, or chew gum while talking on the phone. It sounds horrible.
- Speak clearly.
- Be helpful...all the time.
- Say "good-bye" at the end of a conversation. Avoid saying "bye-bye", or "later".
- Let the caller hang up first.

Wrong Numbers:

If you have reached a wrong number, it is important to say: "I'm sorry. I must have called the wrong number. Sorry to have disturbed you."

Telephone Anxiety...

This can happen when we feel anxious or nervous about talking on the phone. We don't want to talk to strangers or customers. We are worried about getting information wrong, or not knowing what to say. A large number of jobs involve talking on the telephone, but telephone anxiety is something that can stop us from taking (or accepting) jobs that we otherwise would enjoy, or be very good at.

Learning Activity #15

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

1. Think about the term “telephone anxiety”. What is it?
2. What are some reasons why we could be nervous or anxious when using the phone?
3. What are some ways to overcome telephone anxiety? If possible, talk it over with a partner and write some suggestions below. If not, work on your own.

How Can We Overcome Telephone Anxiety?

1. Be prepared! Have a pen and message pad or tablet available. That way, you will remember all of the important information.
2. Speak slowly and clearly.
3. Practice. Ask a friend to help you. Write down what you need to say. Knowing what you are going to say takes a lot of pressure off.
4. Imagine you are the customer. Why would you be calling the business? What might you want or need to know? Take the time to learn important information and names of people in your organization. Know your company’s website so you can readily find requested information. This may include a price list, your company history, the names and extension numbers for staff and product information.
5. If you are unable to answer a question, take the caller’s name and number, find the information, and call the customer back right away.
6. If you will need to transfer calls, find out who does what on your staff, and keep this information handy. For example, *“Jane in accounting can help you with that, Mr. Jones. I’ll transfer your call to her desk. For future reference, her extension is 4321.”*

What to Say...and How to Say It.

Identify Yourself.

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

Why Identify Yourself?

If you are calling someone, identifying yourself lets them know who you are and what company you are calling from. This helps them to know why you are calling. If you are answering an incoming call, identifying yourself and your company lets the caller know right away if they have reached the correct number and to whom they are speaking.

Suggestions for Answering the Telephone.

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

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

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

- “Hello. This is Mary Jones from Spy Glass Enterprises. I am calling for Tom Lamb. Is he available?”
- “Good morning. May I speak to Tom Lamb please?”...“Thank you.”...
- “Hello, Mr. Lamb. This is Mary Jones from Spy Glass Enterprises.”

While You Were Out ... The Art of Taking Messages.

When you are taking a message, it is very important to make sure you have all the information. Many companies provide message pads. These pads help you to record all the necessary information. If you have all the areas on the pad filled in, then you have all the information you need.

Take a Message, Please.

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

Taking Messages:

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

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

- **Who is the message for?**

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

- **Date and time**

Perhaps the message is for a person who will be away for several days. They need to know when people called them.

- **Is the message urgent?**

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

- **Who is the message from?**

Write down the caller’s first and last name. Ask for correct spelling. If the name is unusual, you may want to write down what it sounds like. For example: “Miss Smythe - pronounced Sm-eye-th”.

Although people with unusual names may be used to people saying their name wrong, it is **much** more respectful to say their names correctly, and it’s a good opportunity to show them that they are valued customers...and getting their name correct is important to you!

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

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

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

Ask for the caller's phone/cell number and/or email.

- **Action**

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

- **What is the message?**

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

- **Sign your name**

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



Learning Activity #16

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

Each person should have access to a phone or cell phone. Decide who the caller is and who the message taker is. You will have an opportunity to switch positions so that each person can practice taking a message. Use the message pad on the next page (print this page as often as needed). Remember what we have just learned about taking messages. Try to follow those instructions.

Instructions for the caller:

Read the following situations below. Choose at least three of the following scenarios, or make up your own. Do not tell your partner the details until you are “on the phone” with them. Make up names and any other details you would like.

- You work at a computer store. You are returning a call about an estimate for fixing a computer.
- You are calling to tell a customer that your boss cannot make it to a meeting with them, and would like to make another appointment for next week.
- You are calling to talk to Mrs. or Mr. Smith and would like him/her to call you as soon as possible. You leave several telephone numbers and times when you can be reached.
- You are calling to set up an appointment. You leave a date and time, and ask that the person you are meeting call you back to confirm the date.
- You are calling your doctor and you want her to email you the results of the tests you had done recently. You need it right away.
- You are calling your workplace to tell them that you are ill and unable to come in to work today. You have a doctor’s appointment this afternoon. You will call your boss after you see your doctor.

Out to Lunch.

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

Avoid negative responses.

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

- The use of the word still makes it seem that Mr. Jones has been out to lunch for a long time.
- If, for some reason, Mr. Jones is unable to return the call until later in the afternoon, the caller is going to think:
 - Mr. Jones takes very long lunches.
 - Mr. Jones has better things to do than call me. I am not important to him or his company.

"Mr. Jones is not taking any calls this morning."

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

Offer alternatives.

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

"Mr. Jones is in a meeting. Mrs. Wong is taking his calls. Would you like me to transfer you to her office?"

Learning Activity #17

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

YES	NO	CONVERSATION
		1. "Hi. How's it goin'? How can I help you?"
		2. "Hello. Great Lakes Printing Company. Rashid speaking. How can I help you?"
		3. "What?"
		4. "You want me to look up that number for you? Don't you have the internet? If you look under computers you'll find it."
		5. "Yes. Can I do something for you?"
		6. "I can put you through to Mr. Mohammed. He handles all general inquiries. Can I put you on hold?"
		7. "Thank you for calling South Bay Computers, Mrs. Smith. I am glad that we could help you. Please call us again if there is anything else we can do for you."
		8. "Christine can't come to the phone. She's busy. You can call back later. Thank you."
		9. "I'm going to put you on hold. Someone will be right with you."
		10. "Mrs. Wong is not in the office at the moment. May I take a message?"
		11. "Hold please."
		12. "Let me repeat that address for you, Mrs. Forest. It's..."

		13. "Ms. Green is on lunch break. She's usually about 10 minutes late, but I can have her call you as soon as she returns, Mr. Khan."
		14. "Are you aware of our Customer Savings Option Plan? If you have a few minutes, I could explain the benefits to you."

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

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

What Do I Do Now?

<p>The Dilemma...</p> <p>"I have a customer in front of me and one on the phone...who do I serve first?"</p>
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This is a common problem for anyone who works in customer service. The last thing you want to do is send someone off to another place of business. How do you keep both people happy?

Learning Activity #18

1. If you had a customer in front of you as well as one on the phone, what would you do and why?
2. What would you say to both customers?

Things To Consider:

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

- What type of business do you work for?
- Are there other staff members who could answer the phone?
- Does your employer's voice mail system have helpful information readily available? (For example, hours of operation, ways to reach other staff, etc.)
- Does the customer seem to be okay with you answering the phone?
- How many interruptions have you had while serving this customer?

You need to consider the following:

- If you decide to answer the telephone, first politely ask the customer if they mind if you answer the phone. For example, say, *"I'm sorry. Do you mind if I quickly answer that and take a message?"* Most customers will not mind and will, in fact, appreciate your courtesy. Remember to be polite and show respect for the customer.
- When you answer the phone, quickly find out what the caller needs and decide how you will handle the call. If the caller simply needs a question answered, for example, *"How late are you open?"* you can quickly answer the question and return to the customer in the store. If the caller needs more time or information from you, for example, *"Could you tell me the make and model number of the washing machine I looked at last week?"* you may want to ask if you could call them back.
- Is it possible to answer the phone, take a message and return the call as soon as possible? For example, *"I'm sorry. I am with a customer right now. Your business is important to us, so could I take your name and number and call you back?"*

- Return to the customer and thank them for waiting. For example, you could say, *“Thank you for waiting. I appreciate it.”* Look after your customers’ needs. Do not make them feel rushed now that you have a call to return.
- If you have a call to return, do it as soon as you do not have a customer.

Learning Activity #19

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

1. You are filling in for the customer service receptionist over the lunch hour. Your manager is having lunch in her office, and has asked not to be disturbed, unless it is an emergency. A customer is on the telephone and is very upset about something. He wants to talk to someone now. The customer tells you he has called and left at least two messages earlier that day. He is very upset that no one has returned his messages.

How do you handle this situation?

2. You are busy with a customer when the telephone rings. You have asked in a polite manner if you could quickly answer the phone. The customer is very pleasant and told you not to hurry. You answer the telephone, and after your professional greeting, the caller asks about the current sale that is happening at your store.

How would you respond?

3. Have you ever called a business and heard, “Hold, please,” without being allowed to say anything before you were placed on hold? How did you feel?
2. What would be a better way to greet the customer when you must put them on hold?

Unit 4: The Upset Customer

Parts of this Unit were adapted from “Customer Service...it’s more than just “Thank you, come again!”, produced by Literacy Link Eastern Ontario. Used with permission.

Learning Activity #20

1. Customers stop buying from a particular business for the following six reasons. Using the numbers 1 to 6, rate the following from most important to least important:

- _____ They have passed away
- _____ They moved away
- _____ They formed other interests
- _____ They now shop at another business
- _____ They are unhappy with the product
- _____ They were served by someone who was rude or indifferent to them

2. Explain why you made the above choices.

Studies have shown that customers stop buying from a business for the following reasons (in priority order):

- They were served by someone who was rude or indifferent to them
- They are unhappy with the product
- They now shop at another business
- They formed other interests
- They moved away
- They have passed away

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

Describe the situation:

4. Think of a time when you were faced with an upset or angry customer, or when you have observed an angry customer. Explain the situation. Why do you believe they were angry, how did they act, how did you handle the situation, and what was the end result?

My “upset or angry customer” situation:

Why I believe this customer was upset or angry:

How they acted:

How I handled the situation:

The end result:

Customers Could Be Upset Because...

- You or someone at your business promised something that was not delivered.
- They were already upset at someone or something else.
- They are tired, stressed, or frustrated.
- They feel no one will listen to them unless they yell.
- You or someone in your business was rude, indifferent or impolite.
- They were told one thing by one staff member and told something else by another.
- They didn't feel they were listened to.

- They made a wrong assumption as to what your business could do for them.
- They were told they had no right to be angry.
- They were given a sarcastic or rude reply.
- They were embarrassed about doing something incorrectly.
- Their integrity or honesty has been questioned.
- Someone in your business argued with them.
- They had a bad day.

Upset Customers Want...

To Be Taken Seriously

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

To Be Treated With Respect

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

Immediate Action

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

Compensation

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

Someone To Be Reprimanded Or Punished

Make sure customers know that action will be taken, even if you are not the supervisor. Report the incident to the supervisor so he or she can explain the problem to your co-workers and avoid similar problems in the future.

To Clear Up The Problem So It Never Happens Again

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

To Be Listened To

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

Dealing with Angry Customers...

If you deal with people at your work, you will probably run across angry or hostile customers. It is not a good idea to respond to a customer's bad attitude with the same kind of behaviour. This will only serve to "fuel the fire", and may make the situation worse.

This is never an easy situation to deal with but, by following a few simple tips, you can usually make the situation as productive as possible. Understanding why some customers behave this way can help you to deal more effectively with them and to diffuse the situation.

However, you do NOT deserve to be threatened or harassed by angry customers. Ask your manager, a co-worker for assistance, or call security if you are feeling scared or threatened.

Why Do People React This Way?

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

- The best price
- Quality items
- Good service
- Fast service
- Attention from staff

These reasons may make a lot of people angry; however, people react in various different ways. Some may get angry, and verbally let the person know that they are angry and dissatisfied with the service they have received, or the product that they have purchased. Other customers may choose to stop shopping in that particular store, so they avoid the situation altogether. Some customers will complain to the management, or write a negative online review or social media posting.

Still others may choose to react violently and abusively. This is NOT acceptable behaviour. For each of these people, there is a story behind why they are so angry. Most angry customers have learned that, when they rant and rave, they often get what they want. They are probably the people who were schoolyard bullies!

Most people do not act this way...but the ones who do really make it rough for everyone else. Remember that you, as a customer service professional, need to stay calm and act in a professional manner. Your job is to try to calm them down, if possible, and if not, then to keep yourself and other customers safe. If needed, ask your manager or security for help. You never have to accept violent or abusive behaviour!

To Diffuse Customers' Anger:

- Respond slowly
- Help customers feel that they have choices
- Do not become angry
- Treat customers as individuals and show concern for their needs
- Put yourself in their situation

How to Deal with Angry Customers – Don't Get Angry

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

Anger Is An Emotion That We All Have

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

Why Are Customers Angry?

Usually, when customers are angry, it is because they are feeling unappreciated and helpless. It is a reaction we have when we feel attacked or wronged. Sometimes, however, customers are angry due to their own learned behaviour. As best you can, try to find out why a customer is angry.

The Source of the Anger

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

Anger vs. Aggression

If customers become aggressive, then back away from the situation. Aggression crosses the line from expressing anger to the intent to scare or hurt someone, or to damage something. In these situations, ask your manager or another staff person to help. You have the right to feel safe.

Stay Focused on Solving the Problem

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

Let Customers Know You Understand the Situation

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

Praise Yourself for Handling the Situation

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

Seek Help When Necessary

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



Learning Activity #21

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

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

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

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

4. What are five ways to diffuse customers' anger?

5. What is the difference between anger and aggression? Give an example for each.

6. When should you ask for help from your co-workers or your manager or even security? Describe a situation where you would ask for help.

When Anger Changes To Violence Or Abuse

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

- Make you feel that you are not capable of doing your job
- Manipulate you
- Make sexist or racist remarks
- Swear
- Threaten you
- Throw things
- Stand very close to you



All of these things are used to control you and your actions. Occasionally, the situation will escalate and customers will become verbally abusive or even physically violent. As someone working in customer service, you need to be prepared for this kind of behaviour and try to avoid it. However, you may still have to deal with abusive customers.

Any violent behaviour is completely unacceptable. Call for help immediately!

Fortunately, customers like this are rare. In situations like this, your first priority becomes keeping yourself and other customers safe.

If you feel a customer has crossed the line and become violent or abusive, and you are afraid for your safety, you need to:

- Stay calm!
- Get the attention of a co-worker, who may have already noticed the situation
- Call your manager or supervisor
- Ask the customer to leave
- Call security or the police if necessary

Violent and abusive customers can be banned from stores, businesses and malls, or charged by the police depending upon the severity of the situation.

Words that Make a Difference

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

Use Impersonal Statements	
<u>Communication Blocker</u>	<u>Communication Helper</u>
You didn't do this right.	There are a few areas on this form that we need to complete.
If customers do something wrong, point out the mistake indirectly. They may be embarrassed by the mistake. Customers may get angry because of the mistake and try to blame you. Even if customers are wrong, the time to point it out is not when they are angry.	

Use “I” instead of “YOU”	
<u>Communication Blocker</u>	<u>Communication Helper</u>
You're wrong.	I can see that there has been a misunderstanding.
You're confusing me.	I'm confused.
Don't blame customers. When explaining what went wrong, use an indirect approach or “I” statements as much as possible.	

Avoid Giving Orders	
<u>Communication Blocker</u> You have to... Wait here.	<u>Communication Helper</u> Will you please... Would you mind waiting here while I speak to my supervisor?
People like to be given a choice. Ask customers pleasantly to do something, and explain how it will be to their benefit. People don't like to be given orders.	

Take Responsibility	
<u>Communication Blocker</u> I can't... It's not my job.	<u>Communication Helper</u> I don't have the authority. However, Mary should be able to help you. Let me get her. Let me see what I can do to help. Rashid is the specialist in that area. Let me get him for you.
Tell customers what you can do together; not what can't be done. If you cannot help, connect the customer with someone who can. Even if the customers' needs are not within your job duties, never tell them that. Tell them how you can help, and refer them to a person who can give them the help they need.	

Avoid Causing Defensiveness	
<u>Communication Blocker</u> You never do it right. You're always late.	<u>Communication Helper</u> This is often completed incorrectly. This payment is often late.
"Always" and "never" sound critical and uncompromising. Use "often" instead.	
<u>Communication Blocker</u> You filled this out but...	<u>Communication Helper</u> You filled this out well, and...
People don't listen to what you say before the "but"; they concentrate on what follows. Use "and" instead, so they will listen to the whole sentence.	
<u>Communication Blocker</u> It will cost you...	<u>Communication Helper</u> The rate is...
"Cost" sounds negative. It can imply time, aggravation, and other things in addition to money.	
<u>Communication Blocker</u> What is your problem?	<u>Communication Helper</u> Please tell me what happened.
People don't like to have problems. They also don't like others to know they have problems.	

Eight Steps for Handling Difficult Customers

1. Remain Calm

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

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

2. Allow Customers to Express Their Concerns

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

3. Show You Understand

Acknowledge customers’ emotions. For example:

- *“I understand that you are angry.”*

4. Restate The Problem

After customers have described their concerns, restate the problems. It could be that you have interpreted the situation quite differently from your customers.

5. Find Agreement – If Possible, Get On Their Side

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

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

6. Gently Confront

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

7. Transfer Your Customers

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

8. Get Help If Needed

If a customer becomes abusive or you fear for your safety, get help from a co-worker, management or security.

When Customers Are Showing Impatience...

When customers begin to show impatience, you should:

- Remain cool and efficient
- Pick up your speed, if possible
- Smile more and say less
- Thank them for waiting

Learning Activity #22

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

1. What are some violent and abusive behaviours shown by angry customers?
2. What is your priority when customers become violent?
3. If you become afraid for your safety, what are some things you need to do?

4. What are the five types of statements that will help you to deal with difficult customers? Provide your own example of a “communication blocker” and a “communication helper” for each.

5. What are seven steps to handling difficult customers? Provide an example of each.

6. When customers are showing impatience, what are four things you should do?

7. Listed below are seven ways to react to difficult customers. Place a check mark beside the statements you think are acceptable reactions for a customer service professional.

When faced with difficult customers you should...

- ☐ Show a slight amount of disgust on your face so customers will know you consider them a problem.
- ☐ Smile, be polite, but put customers down with a slight challenge in your eyes.
- ☐ Stay cool and be patient; let customers talk out their anger.
- ☐ When dealing with customers, don't take anything that is said or that happens personally.
- ☐ Walk away.
- ☐ Become distant and less cooperative yourself.
- ☐ Calm customers by asking, “Are you trying to give me a problem?”

8. Why did you check-mark those particular statements? Explain why you believe these are examples of appropriate ways to behave with difficult customers.
9. Why are the other statements not good examples of how to deal with difficult customers?

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 2

A - Find and Use Information – A1.1, A2.1, A3

B - Communicate Ideas and Information – B1.1, B3.1a, B3.1b, B4

C - Understand and Use Numbers – C1.1, C2.1, C4.1

D - Use Digital Technology – D.1

O

A

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Retail Curriculum Module 3 – Tools of the Trade

Module 3 – Tools of the Trade

Unit 1: Introduction

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

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

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

Selling on the Internet is more popular than ever in Canada. Almost every store, large and small, sells their items on the Internet and has a website, and often a Facebook Page that shoppers can easily access. Many people shop online and then have the items shipped to their house or business. Another way people are shopping is by looking up the items on line, and then going to the store to see them up close, or ordering the item to be delivered to a certain store and then picking it up.

The Internet lets you look up certain specifications about products, and it also lets you compare prices. Nowadays, working in retail also means that you should be familiar with computers and the Internet. You may need to look up items in the store or online for customers, and then place the order as well. Computers and tablets let you look at other stores in your chain to see if they have an item that you don’t, and they also let you look up a customer’s information in seconds flat. Needless to say, the Internet is something all retail stores and places of business rely on and use on a daily basis.



Tools of the Trade

Equipment and Technology

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

Supplies

Supplies are quite different from equipment. They are items that are used up in the store and then re-ordered. Examples of supplies might be printer paper, toner, paper towels, cleaning supplies, cups for water and staples.

Point-of-sale System

Point-of-sale systems are the types of equipment used to make a transaction and put through a sale. The system can be as basic as a cash register that stores cash and coins but, today, machines that swipe debit cards or credit cards, and even allow the customer to “tap” his or her bank card to complete the transaction are mainly used. These systems are more convenient and take less time to complete a sale.

Data

Digital technologies are giving us quick and easy access to data on customer trends. This access to data is also transforming the world of retail.



Learning Activity #1

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

Equipment	Function	Example
<i>Computer</i>	<i>Research items, prices, and availability</i>	<i>Look up styles and prices of a coat, and see if it is in stock</i>

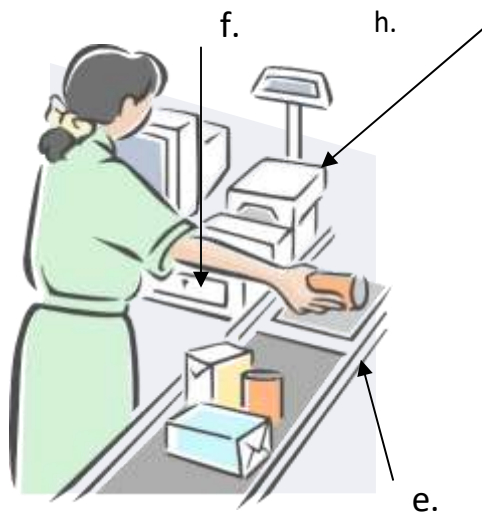
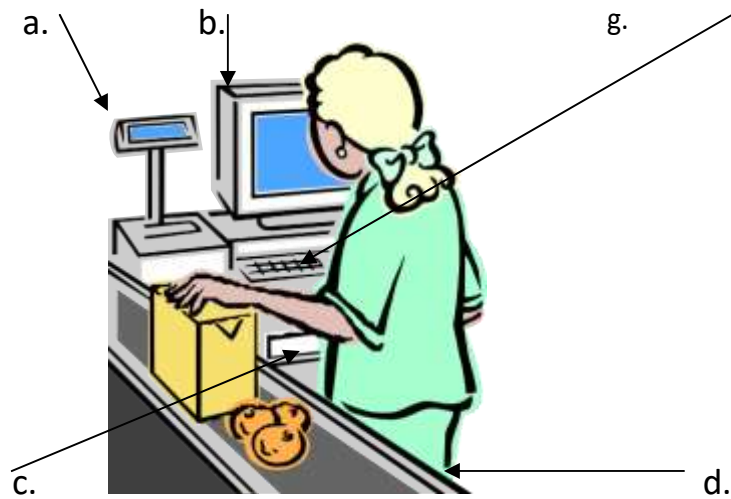
2. Share your list with other classmates. Did they come up with similar lists? Write down equipment items that were not on your list.

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

Supplies	Use
<i>Writing utensils/paper/note pads</i>	<i>Write reports, fill in sales orders, jot down notes and write memos</i>
<i>Screw driver set</i>	<i>Put together or take apart various things in the store/fix things</i>

4. Retail workstations in larger stores have common tools they use. The two pictures below show typical work areas you might find in a retail operation, such as a grocery store. Write the letter from the pictures below next to the correct word in the following table.

computer screen		counter	
keyboard		scanner	
cash drawer		price display screen	
supply drawer		printer	



5. Find a partner and think about other equipment and tools that might be part of a retail work station. Write these down.

Technology

Technology is a vital component of the retail environment. Cell phones and email are important to exchange information quickly. Computers do everything from keeping track of sales to automatically restocking inventory.

Databases help to keep a record of customers' numbers, items they've purchased and other information. The internet and social media are used for sales, promotions, research and engaging with customers.

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

- Keeping track of sales
- Calculating percentages such as discounts
- Updating inventory
- Preparing a database of customers
- Accessing email for company information and updates
- Searching the internet for trends to see what the competition is up to
- Calling customers and other stores
- Emailing information
- Analyzing sales
- Entering schedules and payroll

6. Find a partner and think about other ways in which retail associates could use technology. Write these down.

Unit 2 – Calculators

In this section, you will be shown how to use the basic functions of a calculator. Most calculators are a lot alike, but there will be some keys that will differ. All cell phones have a calculator. You should be able to use the basic functions to perform simple math calculations.

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

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

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

Clear keys allow you to erase mistakes.

Some clear functions include:

- On/Clear (ON/C): Press this once to turn on your calculator; after it is on, this key works as a clear key.
- Clear: Everything is cleared off of the display, except the memory. You may press this when you want to start over.
- Clear entry (CE): This function clears only what you have just entered. You may use this when you made a mistake in your last entry.

Look on your calculator and find the above clear buttons.

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

The equal key is one of the most important and basic calculator keys. This key is used to display the final answer of the equation.

Learning Activity #2

1. Decide if each of the following tasks are addition, subtraction or multiplication. Put the sign for the operation on the line.

- a. You have to take away \$5.00 from a current price. _____
- b. You must give 20 people four pens each. _____
- c. Jim has four hours of work a day for 5 days. How many hours does he have? _____
- d. Give the total amount of merchandise for 3 hats, 6 shirts, 5 scarves and 2 jackets. _____
- e. The difference between \$24.00 and \$12.50. _____

2. Using your calculator, find the answers to the questions below. Don't forget to clear your memory before you begin!

f. $65 - 45 =$

g. $324 \times 2 =$

h. $15 \times 8 =$

i. $89 \div 21 =$

j. $20 + 34 =$

k. $64 \div 8 =$

g) $56 - 29 =$

h) $98 + 38 =$

i) $85 \times 4 =$

j) $53 - 8 =$

k) $32 + 8 =$

l) $95 \times 25 =$



Calculating Dollars and Cents

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

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

Learning Activity #3

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

	Screen	Written Totals
$\$456 + \27	483	\$ 483.00
$\$7,890 \times 7$		
$\$89.50 \div 5$		
$89\text{¢} + 3\text{¢}$		
$68\text{¢} + 5\text{¢}$		

Addition with a Calculator

When you are using a calculator, you will probably have more than two numbers to add together.

When adding on a calculator, it does not matter how you enter the numbers. It will always produce the correct answer. For example, if you enter $3+4+5+6=18$, or if you enter $6+5+4+3=18$, the answer will be the same.

Learning Activity #4

1. Using your calculator, answer the following questions.

$459 + 896 =$	$5 + 6 + 10 + 56 + 0.3 =$
$23 + 58 + 56 =$	$0.95 + 3.89 =$
$2.59 + 6.35 =$	$5 + 20 + 0.35 + 0.2 =$

Remember! Decimals are important, no matter where they appear in the numbers.

Try the following:

$1.22 + 13.4 =$	$.55 + 1.08 =$
$1.9 + 20.55 =$	$34.5 + 4.45 =$

2. Using your calculator, solve these problems.

$\begin{array}{r} 23 \\ + 98 \\ \hline \end{array}$	$\begin{array}{r} 475 \\ + 326 \\ \hline \end{array}$	$\begin{array}{r} 19.09 \\ 356.29 \\ + 0.89 \\ \hline \end{array}$
$\begin{array}{r} 789 \\ + 456 \\ \hline \end{array}$	$\begin{array}{r} 23,189 \\ 4,000 \\ + 300 \\ \hline \end{array}$	$\begin{array}{r} \$789.00 \\ \$989.00 \\ + \$32.00 \\ \hline \end{array}$

Word Problems

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

1. Jen works in a department store. She sold 126 pairs of shoes in the past week. The week before that, she sold 150. She predicts that she will sell 215 pairs of shoes next week. How many pairs of shoes will she have sold in three weeks?

2. Khalil's art store had sales of \$234.67 on Monday, \$156.12 on Tuesday, \$456.89 on Wednesday, \$378.39 on Thursday, and Friday he made \$789.00. How much money did Khalil's art store make that week?

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

4. Chun had a float of \$100 in her cash register. By the end of the day, she had made \$856.34. How much money should Chun have in total in the cash register?

Subtraction with a Calculator

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

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

Solution: $2000 - 890 - 678 = 432$

Answer: There are 432 phone chargers left in stock.

Learning Activity #5

1. Using your calculator, answer the following questions.

$45 - 24 =$	$\$789.56 - \$29.90 =$
$\$89 - \$56 =$	$59 - 23 =$
$3567 - 678 =$	$\$12 - \$9 =$

2. Using your calculator, answer the following questions.

$\begin{array}{r} 234 \\ - 89 \\ \hline \end{array}$	$\begin{array}{r} \$300 \\ \$261 \\ - \$20 \\ \hline \end{array}$	$\begin{array}{r} \$100.89 \\ \$50.59 \\ - \$3.35 \\ \hline \end{array}$
$\begin{array}{r} 200,000 \\ 12,869 \\ 223 \\ - 1,204 \\ \hline \end{array}$	$\begin{array}{r} 20.00 \\ 9.56 \\ - 0.39 \\ \hline \end{array}$	$\begin{array}{r} 0.90 \\ - 0.35 \\ \hline \end{array}$

Word Problems

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

1. A customer comes into your department store and hands you four twenty dollar bills (\$80.00). His bill comes to \$73.86. How much change do you give the customer back?
2. Charlie had a total of \$8095.00 in sales in a 2-week period. Two weeks later, he had a total of \$3897.00 in sales. What is the difference between the sales amounts?
3. Marina has just bought a business on the main street of her town. She has a budget of \$3050.89; she needs \$1000 for rent, \$789.67 for hydro, and \$170.89 for telephone and Internet. She had to replace the sign in the front of her shop. It cost her \$1000. How much money does she have left over for advertising and decorating?

You can check your work when subtracting equations by adding back the number you have just subtracted, as shown in the example below.

10	3.44
<u>- 6.56</u>	<u>+ 6.56</u>
3.44	10

Multiplication with a Calculator

Multiplying on a calculator is very similar to adding on the calculator. You can place the numbers in any order and you will have the same answer. You press the times button (x) after each number and, at the end of the equation, press the equal button (=).

Example A: A convenience store received 20 cartons of pop. Each carton held 4 cases of 24 bottles of pop. How many bottles of pop did the convenience store receive?

Solution: $20 \times 4 \times 24 = 1920$

Answer: The convenience store received 1,920 bottles of pop.

Multiplication is handy because it can make adding faster. Instead of pressing $3 + 3 + 3 + 3 + 3$, you can simply enter 3×5 (because there are 5 number 3s).

Checking Your Work

When multiplying with your calculator, you can check your work to ensure accuracy by using division to “undo” the multiplication. Divide the answer by one of the numbers you multiplied. The answer should be the other number.

Example B: $47 \times 52 = 2,444$
 $2,444 \div 52 = 47$

Learning Activity #6

1. Using a calculator, answer the following questions.

$58 \times 6 =$ $5 \times 20 =$ $5.03 \times 3 =$ $5.63 \times 20.35 =$ $.06 \times 0.0069 =$ $200.02 \times 32.06 =$	$5.36 \times 58.56 =$ $5689 \times 56 =$ $458 \times 45 =$ $.023 \times 0.23569 =$ $.25 \times 0.25 \times 58 =$ $5 \times 9 \times 10 \times 3 \times 87 =$
--	---

Check your work on these!

- $22 \times 29 =$
- $12 \times 60 =$
- $35 \times 100 =$
- $332 \times 118 =$
- $21 \times 21 =$

2. Multiply using your calculator. Don't forget to check your work by using the formula shown earlier.

$\begin{array}{r} 300 \\ \times 35 \\ \hline \times 10 \end{array}$	$\begin{array}{r} 13 \\ \times 5 \\ \hline \end{array}$	$\begin{array}{r} 5.23 \\ \times 0.65 \\ \hline \times 23.35 \end{array}$	$\begin{array}{r} 2000 \\ \times 10 \\ \hline \times 12 \end{array}$
$\begin{array}{r} 2.36 \\ \times 10.50 \\ \hline \times 2.65 \end{array}$	$\begin{array}{r} 10 \\ \times 232 \\ \hline \times 1228 \end{array}$	$\begin{array}{r} 20.00 \\ \times 0.35 \\ \hline \times 0.10 \end{array}$	$\begin{array}{r} 125 \\ \times 225 \\ \hline \times 100 \end{array}$

Word Problems

Solve the following word problems. Make sure you show your work.

1. Joey has 20 racks of bread in his store. If there are 8 loaves on each rack, how many loaves of bread does he actually have?
2. Zahara owns a retail store. She wants to order some more shirts. They cost \$29.99 each. Zahara wants 50 of these shirts. How much would she have to pay?
3. Arif makes \$16.00 an hour; he works 8 hours a day. If he worked for 5 days each week for a year (52 weeks), how much money would he make?
4. Each month Gale pays \$800.89 to rent her store. How much is she paying to rent the space for a year (12 months)?

Division with Calculators

On your calculator you will find a division symbol. This symbol will look like this: \div . When dividing on a calculator, you have to enter the numbers in the correct order. If you don't, the division will be wrong.

Here are a few examples of different types of division questions:

$\begin{array}{r} \underline{20} \\ 5 \overline{)100} \end{array}$	$\frac{100}{5} = 20$	$100 \div 5 = 20$
--	----------------------	-------------------

When using your calculator, you must always begin with the number to be divided, which is usually (but not always) the bigger number.

- Example: The cost of printing an advertisement for your store in the newspaper ten times is \$206.40. What is the cost each time?
- Solution: $206.40 \div 10 = 20.64$
- Answer: The cost for each advertisement in the newspaper is \$20.64.

Checking Your Work

When you are dividing on a calculator, you can check for accuracy by “undoing” the division. Multiplying your answer by the number that you used to divide with can do this.

$$20.64 \times 10 = 206.4$$



Learning Activity #7

Using a calculator, answer the following questions. Check your work using multiplication.

$65 \div 5 =$	$56.35 \div 7.25 =$	$89.00 \div 5 =$	$0.89 \div 0.32 =$
$1023 \div 106 =$	$102 \div 2 \div 20 =$	$5 \div 86 =$	$502.2 \div 0.0056 =$

Word Problems

Answer the following questions, making sure you show all of your work. Don't forget to check your work!

1. Todd purchased 20 mirrors for his store. The total cost was \$1,034.04. How much was each mirror?
2. Mr. Khan wants to order 40 new books for his bookstore. He can only order them in boxes of four. How many boxes does he have to order?
3. Jessie orders \$500 worth of advertising on a billboard for 8 months. How much is she paying per month?

Simple Averages on a Calculator

Finding the average on a calculator takes two steps. The first step is to add up the numbers. Then you divide the total by how many numbers are in the group.

The general formula is $\frac{\text{Total of the numbers}}{\text{How many numbers}} = \text{Average}$

Example: Susan worked the following hours for four weeks: 30, 42, 35 and 37. Find the average weekly hours.

On a calculator, you can add up the numbers, then divide without clearing between steps!

Solution:

Step #1	Step #2
$ \begin{array}{r} 30 \\ + 42 \\ + 35 \\ + 37 \\ \hline 144 \end{array} $	$144 \div 4 = 36$

Answer: Susan worked an average of 36 hours a week.

Learning Activity #8

1. Use your calculator and find the average for each set of numbers.

Sales	\$589.36, \$923.25, \$742.12, \$892.23, \$895.12	
Hours Worked	35, 45, 26, 34, 28, 20	
Customers Served	452, 282, 328, 400	
Items Sold	56, 85, 43, 89, 73, 46	
Tips	\$52.25, \$78.35, \$20.89, \$35.83	

2. Below are a store's sales for the month of June. Find the average sales for each department, and then find the average sales for all departments in the store.

<i>Department</i>	<i>Week 1</i>	<i>Week 2</i>	<i>Week 3</i>	<i>Week 4</i>	<i>Total</i>	<i>Average</i>
a. Shoes	200.56	168.65	800.56	300.85		
b. Men's Clothes	800.96	902.54	889.36	950.23		
c. Women's Clothes	1000.89	995.24	899.29	1025.78		
d. Youth's Clothes	800.56	700.25	689.42	699.12		
e. Infant's Clothes	300.85	389.42	500.45	452.21		
f. Home Appliances	9000.98	3008.45	6000.45	10000.21		
g. Sports	2000.00	2089.31	2094.89	2098.32		
h. Toys	500.23	856.25	896.12	826.96		
				i. Total		

3. Nancy has been working at the department store for 4 weeks. She has been keeping track of how many hours she worked; she gets paid \$14.00 an hour. Fill out the chart below.

	June				<i>Sum</i>	<i>Average</i>
	<i>Week 1</i>	<i>Week 2</i>	<i>Week 3</i>	<i>Week 4</i>		
Hours Worked	38	42	48	39		
Amount paid			672			

Word Problems

Use your calculator to find the answers to the word problems below. Make sure you record all of your work.

1. The Paint Shop has a number of cans of paint priced at \$8.75, \$10.25, \$5.89 and \$12.75. What is the average cost for a can of paint?
2. The Butler Company bought 20 new cameras for their security system. The total cost was \$1800.00. What was the average cost of a surveillance camera?
3. Hamadi worked the following hours each week: 45, 36, 38, 46, 30 and 20. What were the average hours he worked per week?
4. Tracey served 200 customers one night at the cashier desk. The next day she served 89. The following three shifts she served 150, 45, and 150 customers. What was the average number of customers Tracey served for these 5 shifts?

Decimals with a Calculator**Place Values****Rounding Decimal Numbers**

When multiplying and dividing, some answers may show many numbers after a decimal. When this happens, you will have to round your answer. Here are some pointers to help you round correctly.

- Look for the next number after the first two numbers following the decimal.
- If the number is 5 or more, round the number up to the next higher number.
- If the number is 4 or less, keep the number to the left the same.
- Drop all the other numbers to the right.

Example: Rounding to two decimal places.

20.568 rounds off to 20.57 - since the 8 is 5 or higher, add one to the 6.

20.452 rounds off to 20.45 - since the 2 is lower than 5, keep 5 the same.

Learning Activity #9

1. Rewrite these calculator answers, rounding to two decimal places.

Original	Rounded	Original	Rounded
85.269	85.27	7.99	
458.396		10.256	
62.69123		42.352	
234.561		4.932	

2. Rewrite these calculator answers as dollars and cents, rounding to the nearest cent. Don't forget the dollar sign (\$)!
- 3.

Original	\$	Original	\$
293.568	\$293.57	6.259863252	
359.210		8956.8	
8.26		1.562	
45.238		78.3256894	

Percents at Work

Fractions, Decimals and Percents

Percents, fractions and decimals show parts of something. 99/100 means the same as 0.99 or 99%. Here are a few more examples. Do you see any patterns?

	Fraction		Decimal		Percent
From 1% to 100%	10/100	=	.10	=	10%
	25/100	=	.25	=	25%
	67/100	=	.67	=	67%

Learning Activity #10

- Write each percent as a decimal.
 - 15% =
 - 33% =
 - 50% =
- Write each decimal as a percent. Do not use your calculator.

0.25 =	0.006 =
0.85 =	0.009 =
.29 =	0.64 =
.45 =	.099 =

Unit 3 – Cash Registers and Point-of-sale Terminals

Cash Registers

Cash registers are used to calculate the sales total for merchandise, record and receive payments from customers for goods and services, and give correct change. There are many brands and models. An older, manual cash register displays the amount charged for goods, taxes and the total. Newer cash registers are fully functional computers called Point-of-sale (POS) terminals. They have many features, including the ability to update inventory and keep records on each customer's purchases.

Most retail stores provide on-the-job training for new cashiers. The new cashier will work with, or “shadow” an experienced cashier until they are comfortable with the functions of the cash register. Some stores offer computer-based training for new cashiers.

Terminology

Tender Type

Tender type is the method of payment. It could be cash, credit card or debit card.

PLU

PLU is a key on the keyboard that is programmed to do Price Look Ups. When a cashier needs to look up the price of an item for a customer, entering the product code, or scanning the bar code, after selecting the PLU key will bring up the price.

Void

The void key on a cash register allows the cashier to remove a single item from a list of purchases or can be used to delete the entire transaction.

Subtotal

Subtotal is the cost of the purchase before taxes.

Total

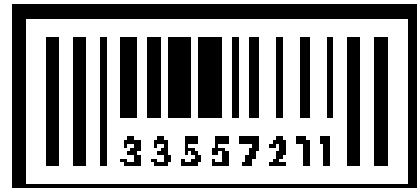
Total is the cost of the purchase including taxes.

POS

Computerized cash registers are called Point-of-sale terminals.

Barcode

A barcode is a Universal Product Code Identification Number (UPC) that is encoded by using a series of lines with different widths and spacing. The product's barcode determines the type and cost of the product being sold.



When a barcode is scanned into the computer, it will display the description of the product as well as the price. Stores can use this information to keep track of inventory. If a barcode is damaged and doesn't scan, there is also a number at the bottom of the barcode that can be entered manually. This number will also bring up the product information and price.

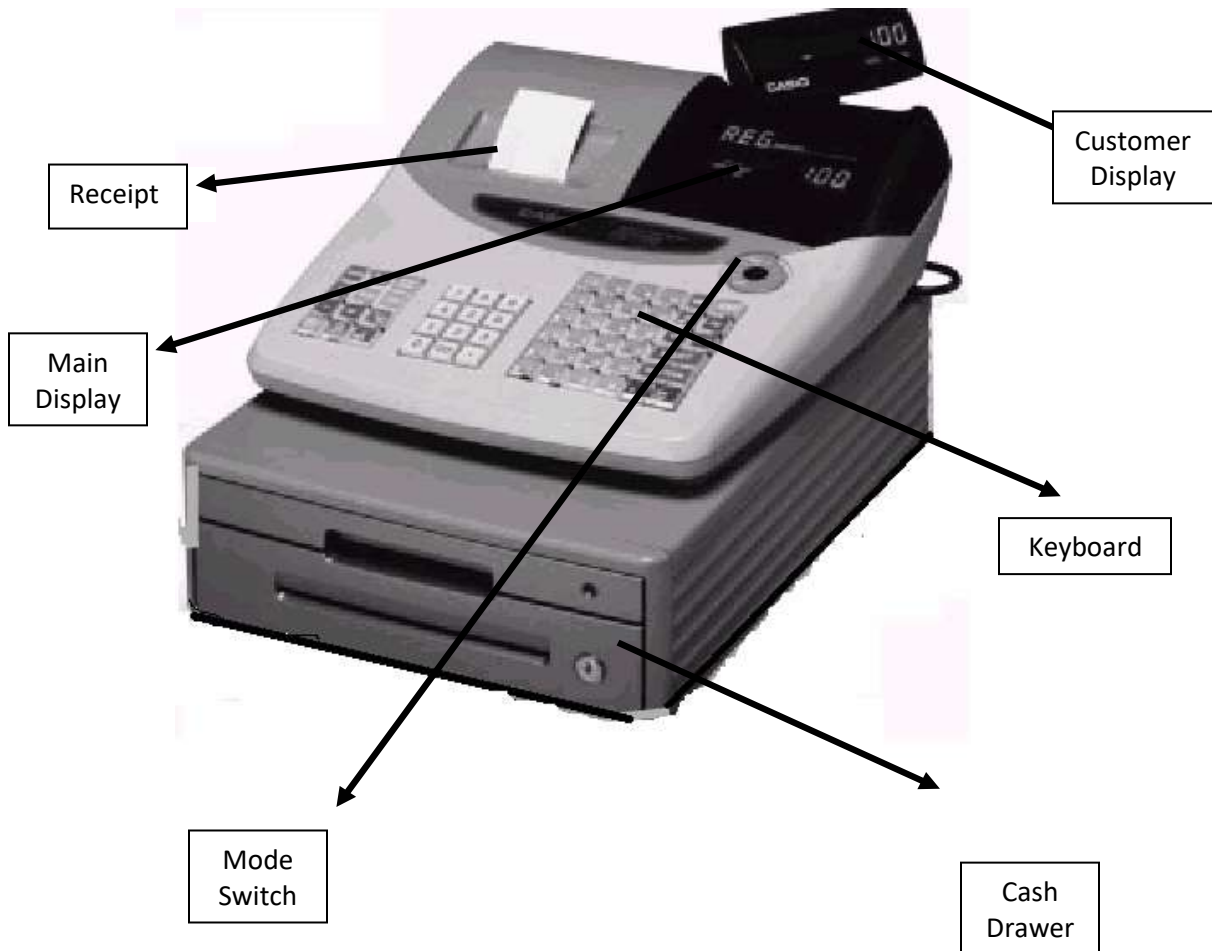
Inventory Database

Some retail stores have entered product information into the computer as a database. This is similar to the way customer information is stored. This inventory database can be used when there is no barcode on an item.

Below is an example of how items are listed in an inventory database. Inventory is usually stored under the name of the supplier.

Price Look-Up				
INVENTORY				
Knitwits Co. 5678 Rue Michael Anywhere, QC 890-567-1234			No. Ordered: 48 In Stock: 40	
Bar Code	Colour	Type	Price	No. Available
06395274	Heather Blue	Crewneck s/s	14.99	6
05284367	Navy Blue	Turtleneck l/s	21.99	10
02563481	Heather Blue	Cardigan l/s	18.99	6
07485632	Sky Blue	Vneck l/s	24.99	8
03624875	Sky Blue	Crewneck l/s	22.99	10

Electronic Cash Register



Parts:

Customer Display

The customer display is the screen that shows the customer the total of the purchase. It can also be set to display how much change the customer should receive.

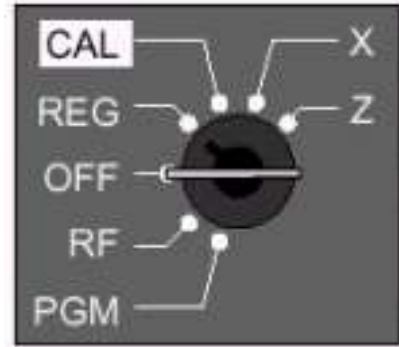
Main Display

The main display is what the cashier sees. It can be programmed to show the date and time, what mode the cash register is in, subtotals and totals.

Mode Switch

The mode switch allows the cash register to be used in different modes. A mode key is entered into the switch to change the modes.

- CAL: Use the cash register as a calculator
- REG: Use this mode for regular transactions
- OFF: To turn the cash register off
- RF: To do a refund transaction
- PGM: To program the keys on the keyboard, and to set the date and time
- X: Read or print the sales data without clearing the memory
- Z: Read or print the sales data, then clear the memory



Cash Drawer

The cash drawer opens when the 'total' key on the keyboard is pressed. You will usually find 4 slots, so that you can separate \$50, \$20, \$10 and \$5 dollar bills. This cash tray will lift up so that the cashier can put in cheques, debit and credit card transactions and bigger bills. Coin holders will be in front of the bill slots so that the coins can be organized and separated.

Keyboard

When a cash register is purchased, it can be programmed to meet the needs of the retail establishment. The system can also be programmed to generate different reports. For example, a larger store may want a report on the total sales for each department in that store. Some of the keys that are common on most keyboards are Void, Tax, Sub-total, Total, Refund and PLU.

Receipt

When a sale is completed, a receipt will be printed. Generally, the receipt will have the store name and address, the price of the individual items, the subtotal, taxes and a total.

Cash Register Maintenance

Cash registers have a printer that prints the receipts. The paper rolls have to be replaced when they run out. Ink cartridges have to be replaced when the printing on the receipt starts to fade. Instructions for changing these items can be found in the cash register manual.

Types of Transactions

There are many transactions that can be done using a cash register. Here are a few examples.

- Cash transaction – The customer will be paying with cash.
- Credit card or debit card – The customer will be paying either by credit or debit card.
- Split tender – The customer will be paying using a combination of cash, credit card or debit card.
- Refund – The customer is returning an item, and the money they paid will be returned in cash or put back onto their credit card or debit card, or sometimes a store credit will be given.
- Void – An incorrect entry was made when the cashier was entering the information into the cash register. A void will allow that entry to be deleted.
- Reports – A report can be generated throughout the day to show sales data without resetting the cash register to 'zero'. Another report is generated at the end of the day to show sales data, and then the cash register is reset to 'zero' for the next business day.

Learning Activity #10

What could go wrong with your cash register?

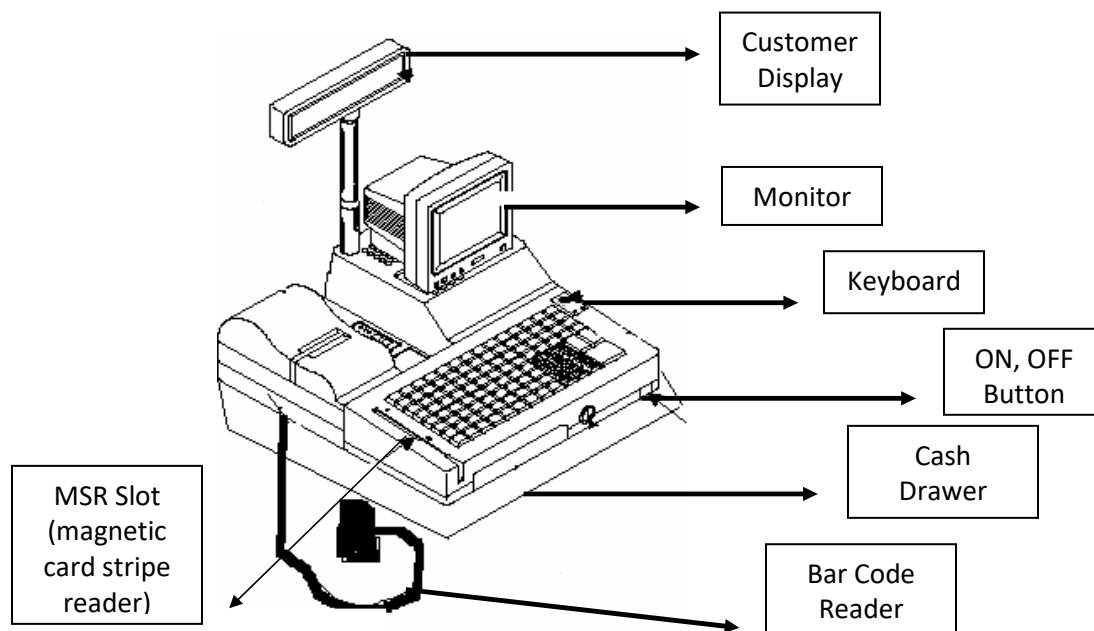
- The cash drawer does not have enough change for the transaction
- There is a power outage
- An error message appears on the screen
- A customer's credit card or debit card does not work

Pick one of the situations noted above and describe how you would handle the problem. Remember to use your customer service skills.

Point-of-sale Terminals (POS)

Point-of-sale terminals have replaced the older style cash registers in most retail stores. A wide range of models can be found in various types of retail establishments. A popular model with fast food restaurants is the touch screen system that lists menu items on the screen and is activated by simply touching the desired item. One feature of computerized cash registers and computer terminals is that receipts list the items purchased by specific name as well as their price.

Point-of-sale Terminal



Parts:**Customer Display**

The customer can see the total of his purchase on this screen.

Monitor

Displays the information the cashier is entering into the cash register.

ON/OFF Button

Turns the cash register on or off.

Cash Drawer

Contains the cash, coins, cheques, credit and debit card transactions.

MSR Slot

The magnetic card stripe reader is used for credit cards or debit cards. When the card is “swiped”, the computer confirms that the card is valid, and that the credit card company or bank accepts the customer’s purchase.

Keyboard

The programmable keyboard allows the cashier to enter information into the cash register.

Bar Code Reader

Scans the information from the products into the cash register.

Receipt

The receipt displays the store name and address, an itemized list of the purchases, the sub-total, taxes and total.

Touchscreen

Sales are entered by touching the items on the screen.



Features:

Bar Code Scanning

A POS with a bar code scanner can calculate the sale, then transfer the information to the store system that keeps track of inventory.

Credit Card/Debit Card Processing

Credit cards and debit cards are swiped through a card reader and then automatically entered into the POS system. The authorization number as well as other information is printed on the customer's receipt as well as on the cashier's slip. All of this information is stored electronically in the POS system. By entering information on the paper or electronic receipt, a cashier or manager can look up information about the sale in the POS system at any time. If the customer has given the store his phone number, address, postal code, or even email address, information about the sale, or past sales, can be looked up.

Customer Data

Customer information can be entered into the computer. This information can be used to inform customers of upcoming sales and special discounts.

Item Quantity and Price Lookup

The quantity key is used when more than one of the same item is purchased. The cashier will enter the number, e.g. 6, and press the quantity key. Then only one of the six items needs to be scanned or entered.

Price Lookup allows the cashier to find the price of an item by scanning the bar code.

Pop-ups

Some POS systems have "pop-ups", or small boxes that come up on the screen. These pop-ups ask you to do certain things before you can continue with the sales transaction. For example, a pop-up may say, "check customer signature" or, "offer extended warranty". A pop-up also has an "OK" button that you will need to touch or click on before you can enter another item.

Processing Transactions

You will need to enter a password to start a transaction on your Point-of-sale terminal. Once you have entered your user password, you are ready to process sales transactions.

1. Enter the items into the computer either by scanning, using a barcode reader, or by manually entering the item codes.
2. Total the sale.
3. Select the type of payment the customer will be using. Then, get them to swipe or tap their card, or you can make change if it is a cash payment. The receipt will print, and you will be ready for the next transaction.

Helpful Videos

The following are links to videos that explain different Point-of-sale Systems:

- **Basic POS system:** <https://www.youtube.com/watch?v=XWuwlChR8c4>
- **Restaurant/kitchen POS:** <https://www.youtube.com/watch?v=rISyrnykrEw>
- **Retail POS system:** <https://www.youtube.com/watch?v=oTPoO2plcJ0>

Learning Activity #11

There are many advantages to using the computerized cash registers or POS systems. Think of two advantages and explain why they are an advantage.

Different debit cards, credit cards, and POS Features

The Tap Feature:

The tap feature on a debit or credit card enables the customer to simply “tap” his or her card against the hand-held device and the transaction is automatically deducted from the customer’s account. There is no need to enter a personal identification number (or PIN number). The transaction is instant, and the receipt is printed right away.

Touchscreen POS systems:

A touchscreen POS system does not require a keyboard. Instead, the staff member simply touches the different items or commands, and the information that is needed appears instantly. The sale is then ready to be processed. Many restaurants and fast food outlets use this type of system since it is quick and easy to use. Often, different colours are used for different items. For example, a red background may be used for sandwiches, blue for beverages, and yellow for desserts. This makes selecting the orders much easier.

Personal Identification Number (PIN):

A PIN number is used by customers after their credit card or debit card is swiped through the POS system. This four-digit number is punched in, and the cashier does the rest. A PIN number should never be shared or given to anybody. If you lose your debit or credit card, you should contact your bank immediately. The bank will then cancel your card, so no one can use it. You will be issued a new card with a new PIN number. Some banks let you, the customer, “lock” your card whenever you want to, using your cell phone, tablet or computer.

Fill in the blanks with the correct terminology:

- A _____ is a four-digit number that the customer punches in to complete the sale.
- The _____ feature deducts a sale instantly from the customer’s account.
- A _____ POS system lets the cashier touch the items ordered during the sales transaction.
- A _____ is given to the customer after the sale is finished, usually in paper form.
- Another name for a bank card is a _____ card.
- A sale _____ occurs when the cashier enters the items being bought, the customer pays with their card or with cash, and the sale is then complete!

Learning Activity #12

Explain why debit cards and credit cards have become the main options with which customers pay for transactions. Can you think of a reason why some people still don’t pay with a debit or credit card? Remember to write in complete sentences.

Unit 4 – Computer Basics

*A few parts of this section have been adapted from **Steps to Employment in Ontario**. Material adapted with permission from LRCT Consulting, Toronto, ON.*

Computers can be found in almost every workplace. In a retail setting, these machines can be a computerized cash register or a system that runs the store's inventory program. They can also be training tools for new employees, a tool for writing documents or creating a database or a spreadsheet, as well as a way to access the Internet and send emails.

A computer is made up of hardware and software. The hardware includes the various parts of the machine, and the software is the programs that run on the computer.

Hardware

Central Processing Unit (CPU): the processor and the memory of the computer.

Memory: holds information that the computer needs to use. The memory is connected directly to the processor.

Input: input is data that is entered into a computer using a keyboard and a mouse.

Output: output is data that is transferred from a computer to other parts, such as a monitor or a printer. These devices allow the user to see the data.

Hard Drive: The hard drive is the data storage area within a device. The hard drive can store or retrieve data. The larger the hard drive in a computer system, the more storage space it has, and the more data it can hold.

Software

Computer programs are software applications. There are numerous kinds of applications that allow users to complete a wide variety of tasks. The most widely used application is word processing. The most common word processor is Microsoft Word.

Word processors have replaced the typewriter as the way to create documents. The documents can be corrected and revised with great speed and efficiency. Other popular software found in a retail environment includes spreadsheet and database applications.

Learning Activity #13

Give an example to explain what you might use each tool or process for.

- Microsoft Word:
- Excel spreadsheet:
- Downloading:
- Emailing:

Why are Computers Useful in the Retail Industry?

Most cash registers today are connected to computers. They are called Point-of-sale terminals or POS terminals. They can provide:

- Quick and accurate sales transactions
- Inventory control
- Price lookup and product availability

Many retailers use computers for:

- Promotional activities
- Email
- Internet browsing
- Computer-based training material
- Tracking sales and inventory
- Connecting with customers via social media
- And so much more...

How to Operate a Computer

Your computer training will depend on the tasks that you are expected to do. Many companies offer in-house, computer-based training for specific software applications that are only used by their company. More formal computer training may be needed if you will be working with word processors or spreadsheets.

Computerized Point-of-sale Systems

POS systems all operate differently. If you get a job as a cashier, you will be trained on how to use that company's specific POS system. You will, most likely, be watching someone operate a system while they key in orders from customers and explain each step to you. Once you have learned how to use it and feel comfortable, you will be working on your own to input sales.

The Internet

The Internet can connect retailers and customers across great distances in a very short period of time. Whether the retail company is small or large, the Internet is an extremely valuable tool. Most businesses have a web presence so customers can have access to merchandise, information, promotional items and services online. Internet use is increasing every day. Many businesses have a social media presence as well, to engage directly with their customers.

Browser

You need a browser to use the Internet. A browser is a computer program that allows you to access the Internet. It will display web pages, record the sites that you have visited, and allow you to bookmark a particular site for speedy access the next time. Google Chrome, Internet Explorer, Edge and Firefox are examples of popular browsers.

Opportunities for Digital Learning

Many LBS agencies offer digital literacy programming, which gives adult learners the chance to upgrade their skills as part of literacy programming.

As well, there are many excellent website where learners can brush up their computer skills. One of the best is GCF Learn Free. This site has helpful online video tutorials that are freely available at: <https://edu.gcfglobal.org/en/subjects/tech/>. There are many valuable online resources for supporting learners to build their digital literacy skills. A quick internet search will lead you to many useful websites and tools.

Further, Ontario's e-Channel online programming can help learners to upgrade their digital literacy skills. They offer a wide array of valuable programming: <https://e-channel.ca/students>.

Learning Activity #14

Test your knowledge. Match the terms with the definitions. If you do not know what an item does, do some research on the Internet or use a computer manual.

Icon	Favourites	YouTube
Address Bar	Downloading	email

- _____ is a scroll down menu that lets you access the websites you use the most.
- _____ is a popular site that plays short videos on a number of different themes, topics and genres.
- _____ is a thin bar at the top of your screen that you can type in to get to certain websites. It often starts with www.
- _____ is the electronic transfer of information from one computer to another, or from a website to your computer.
- _____ is an electronic way to send messages.
- _____ is another name for a picture or symbol.

Learning Activity #15

On the Internet, search one of the following from the list provided, or think of something on your own. You can use a popular name, or just do a generic search. Make notes regarding the following questions:

- Was the website easy to navigate/user friendly?
- What made the website interesting?
- Did the site have everything you expected to see when you browsed through it?
- Would you go back to the site again?
- What would you have added or deleted from the website?

1. A local car lot

2. A brand of shoes

3. Reviews for a movie that is playing now

4. A recipe for something you like to eat or cook.

5. An office supply item (i.e., chair, desk, whiteboard markers, label maker, etc.)



Learning Activity #16

Either in writing or orally, answer the following questions. (Do your classmates agree with you?)

1. Do you think the Internet can grow any more than it already has? Are there things you would like the Internet to do that don't exist yet? Explain your answer.
2. We have to pay money to an Internet Service Provider, but otherwise the Internet is free for anyone to use. Do you think the Internet websites will always be free, or will we have to start paying for certain sites we access, much like cable television?

Email

Email is electronic mail that is sent between computer users. It is a convenient, quick way to send and receive memos, documents and other information. Emails can be sent to a single user or to a list of people instantly. There are many email programs for computers, with Microsoft Outlook being the most popular. In a retail setting, email is a convenient way for management to pass on information regarding upcoming sales, updated store policies, or any other general information to retail staff. Most businesses also email promotional information to their customers, provided the customers have given their consent.

Learning Activity #18

Either in writing or orally, answer the following questions. (Do your classmates agree with you?)

1. List as many uses as you can think of for using email.
2. What are some of the annoying parts of communication by email? In your opinion, what are five ways to avoid problems in email communication?

Email Etiquette

Writing letters and using a telephone or cell phone have practices that guide their use. Using 'yours sincerely' to end a letter, or announcing your name and/or number when you answer the telephone help promote good communication between you and your co-workers or clients.



When it comes to emailing, few people are aware of appropriate practices. These practices (often called 'network etiquette', or 'netiquette') are important because it is easy to send email messages very quickly, and not think about how a message will be received. For example, if you intend to write something in fun, will the humour be evident? If not, it could be quite offensive.

Here are some suggestions for good email etiquette:

Make the subject line a headline

Good emailers summarize their message into a single subject line of no more than 5 to 8 words. This headline tells the story of the message, just like a newspaper headline is the lead story in a simple sentence.

Eliminate the middle man

If I send you a message that asks if we can get together at a certain time, don't respond immediately and say, "Let me check my agenda and get back to you." Reply only after you have checked your agenda, and can answer the question or provide the information needed in the original email.

Be courteous in all emails

"Flame mail" (angry messages that insult or ridicule), is now common in cyberspace. Don't be rude; be as polite face to screen, as you would be face to face.

Be careful about what is said and promised

All email accounts at your work are the property of your employer, who is within his or her rights to read all emails sent to or from company email accounts. Be careful what you say and to whom you say it. This is especially important for those sending messages to, or receiving messages at an email address at work. If you have your own business, be careful not to promise anything that cannot be done, since email is as valid as a stamped letter in a court of law.

Do not overuse fonts, colours, and images in email messages

The occasional word, coloured for emphasis, or simple images in an email message are acceptable, but when every message received from an individual looks like modern art, it's time for a change. Less is more! Use fonts, colours, and images sparingly.

Do not respond to spam messages

Spam is the nickname given to all unsolicited commercial email messages sent to you. They have earned the name spam as a result of their “canned” appearance. If you frequently receive spam, you might be tempted to ask the spammer to remove you from the list. This is the worst thing you could do. A reply to a spam message only confirms to the spammer that your email account is valid. Instead, simply hit the delete button.

Do not use too much punctuation!!!

You'll see lots of email messages where people put a dozen exclamation points at the end of a sentence for added emphasis. Exclamation points are just another way to end a sentence. If something is important, it should be pointed out in the email message.

Do not use too many abbreviations

Abbreviations have become common with email. Only use abbreviations that are common to the English language, such as FYI (for your information) and BTW (by the way), and only with people who you know will understand them.

Use emoticons carefully

Emoticons are simple strings of characters that are put in the email to show the writer's feelings. The most common example is :-). Turn your head to the left and you should see a happy face (the colon is the eyes, the dash is the nose and the parenthesis is the mouth). Use them carefully, because their translations are not universal (a misinterpreted emoticon could lead to misunderstandings and hurt feelings).

Use the appropriate salutation

In a non-business situation, simply use the person's name. You may also use “Dear” and the person's name (e.g., “Dear Virgil” or just “Virgil”). In a business situation, use the following as a guide: If you normally address a person as Mrs./Mr./Miss/Ms. Smith, then that's the way to address them in email. If you normally call them by their first name, then either omit the salutation or simply use their name, or “Dear” and their name. If you are unsure, then stick to the formal salutation. It's the safest bet.

Use a signature to identify yourself

It is a good practice to include your name and company name at the bottom of all email messages. You will sometimes see a user's signature that contains a quote (such as, “...the secret to life is that there is no secret.”) after the person's name. If you choose this option, choose a quote that says something about you. Keep it short.

Continue the thread

Once you send that first email, you will probably get an answer. If you want to reply, what should you do? Do not start a new email message. This breaks the link (called a thread) between the original message, the answer, and your new response. Without the link, it can get difficult for the users on each end to follow the sequence of messages, especially after several exchanges. The correct thing to do is to click on the reply button, which is the same thing as creating a new message, but keeps the thread.

Learning Activity #18

Practice writing an email to a friend or co-worker using the following topics. Try to include at least two paragraphs, using details, salutations and one emoji (happy face, for example 😊). Remember “netiquette” if you choose a topic related to work.

An example has been done for you below.

1. Invite a friend over for a party next week
2. Ask your boss for time off to go to a wedding
3. Request help to decorate a hall for an anniversary party
4. Create a lost pet request

Hi Alex,

I know you are new to the neighbourhood, and that you’ve only been here a few weeks, but I was wondering if you would like to join our soft ball team. I heard you saying that you like to play catch with your son, so I thought you might like to play with us on Tuesday evening, from 6 p.m. to 9 p.m., at Elmhurst Field on Main Street.

We have an extra jersey if you’re interested, and we are looking for someone to play first base or the outfield, but any position you can play would help. We only play for fun so you don’t have to be a pro! Since you’re new here, I thought this would be a great way for you to meet new people. The cost to play is only \$50.00, and that includes a banquet at the end of the season.

If you are interested, just send me an email back before the 28th. Thanks and see you soon.

Sincerely,

Dave Roberts 😊

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 3

A - Find and Use Information: A1.1 to A2.1

B - Communicate Ideas and Information: B1 to B3.1b

C - Understand and Use Numbers: C1.1 to C4.1

D - Use Digital Technology: D.1

F - Engage with Others

OALCF



Retail Curriculum Module 4 – Store Procedures

Module 4 – Store Procedures

Unit 1: Common Work Tasks

*Parts of this section have been revised and adapted from **Steps to Employment in Ontario**. Material adapted with permission from LRCT Consulting, Toronto, ON.*

Retail professionals have a wide range of tasks common to all employees in retail. The following are skills that you will use in any retail associate position.

Using Fundamental Math

As a retail associate, you need to be able to find percentages, multiply and divide. Therefore, you would use basic math skills, such as money math and a calculator.

Research Skills

Finding information for a customer, such as seeing if another store in the chain has an item in the right size or colour, is just one way your research skills could be used. Another example is the ability to find the appropriate information to send a package to the company's head office.

Organization and Planning

To complete a sales transaction, you need to follow a process in a timely, organized manner and be certain not to miss a step. For example, you need to know the correct steps to process a refund on a credit card. You must also be able to plan your workday so you complete all required tasks.

Problem-solving

Problem-solving skills are important every day in retail. The following are some examples:

- If a customer is unhappy about a purchase, as a retail associate, you need to be able to quickly come up with a solution that pleases the customer and fits with your employer's policies and procedures.
- If your cash register system is not operating properly, you need to be able to use a calculator, and pencil and paper, to temporarily calculate sales transactions. You also need to be able to notify the appropriate people about the system problem.
- If a customer asks about an upcoming sale that they read about in the newspaper, a flyer, on a website or on social media, and that you are not aware of, you need to be able to find that information. Most likely, this will be in the company's email messages and flyers about upcoming promotions, or on the company website or Facebook page.

Communication

Reading, writing, listening and speaking skills are required of all retail associates. A retail associate reads various forms of information. Some examples are company guidelines, upcoming events, sales, invoices, schedules and email messages.

Writing includes entering bank deposit information, creating important messages for your supervisor or co-workers, and filling in return and exchange forms. Listening and speaking skills include the various ways you will be communicating with your supervisors, co-workers and customers.

Computer Proficiency

This is also known as computer literacy. It is important to have basic computer skills in the world of retail. The need for these skills continues to grow. Computer proficiency includes the ability to use the Internet, email, and POS machines.

Teamwork

Retail associates, like most workers today, work as part of a team and need to develop this essential skill. An example of effective teamwork is the ability to work co-operatively and efficiently together to reach specific company goals.

Customer Service

Customer service is the most important part of any retail position. Retail associates need to have excellent people skills. As a retail associate, you need to enjoy working with people, be interested in them and be quick to respond to their needs.



Learning Activity #1

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

1. Fill in the blanks by choosing the correct word in the box to complete each sentence.

Refund Strategy	Percentages Literacy	Juggling Relationship
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- A. My _____ with my math teacher was not a good one. I could not understand _____!
- B. Busy people get everything done by _____ more than one thing at a time.
- C. The sweater that I was given didn't fit. I returned it for a _____.
- D. Another phrase for computer proficiency is computer _____.
- E. A good _____ to use in looking for work is to make a list of skills required from job ads in your sector.
2. Mai Ling was thrilled to find the exact dress she wanted for her first day at her new job. She was also happy because the dress was marked down 20%. The original price was \$79.99. The product number on the price tag was 1233321. When Mai Ling went to pay for it, Carla, the retail associate, was very apologetic. She told Mai Ling that the computer system was down, and she would have to handle the transaction manually. For the inconvenience, she would take another 5% off of the final cost of the marked down dress. Mai Ling smiled at Carla. Another 5% was worth the wait.

The following is a blank receipt. Complete it for Mai Ling the way Carla would have to. Remember to use all of the math and calculator skills you have learned in the previous units!

*Extra help: Percentages on a calculator

To subtract a percentage, type in the number you are taking the percentage from, hit the minus sign, then enter the percent amount, and finally the percent sign. Do not hit the equal sign! The per cent sign acts like an equal sign for this procedure.

For example:

- $80 - 30\%$...the answer is 56
- $\$29.99 - 20\%$...the answer is \$23.99

Dresses R Us 123 Main Street Appletown Ontario			
Item	Product number	Quantity	Cost
Less percentage			
Sub Total			
Coupons or other discounts			
Sub Total			
HST			
Total Sale			

3. Carla used a number of skills in this transaction. Beside each skill listed below, describe how Carla would have applied this skill. Provide as much detail as possible.

Communication Skills:

Fundamental Math Skills:

Problem-solving Skills:

Customer Service Skills:

4. With a partner, discuss the following questions. Someone should be the recorder and someone should be the presenter. Present your ideas to other people in your class, if possible. If not, answer the following questions independently.

Do you think Carla did the right thing? Explain why or why not.

Carla is an employee, not an owner. Do you still think Carla was right in her decision? Explain why or why not.

Write a brief description of how you would have dealt with this situation. Describe the skills you would use.

5. The following chart is a list of work tasks described in Human Resources and Skills Development Canada's Essential Skills Profile for retail sales professionals. Assign a code to the list of work tasks according to the skills needed to perform them. The codes are in the first box. There will be multiple skills involved for each task.

N – Numeracy	C – Communication Skills
R – Reading comprehension	IT – Computer skills and Information Technology
W – Writing skills	F – Ability to understand forms, charts or graphs
P – Problem solving skills	

	1. Read product labels for information on the care of products and for instructions on the use of products.
	2. Read lists of customer entries in a database.
	3. Complete purchase orders to restock inventory.

	4. Refer to assembly drawings of a product.
	5. Use word processing to write a letter or email to quote a price to a customer.
	6. Refer to product books or catalogues to find the range of items offered in various product lines.
	7. Contact a store in another location by telephone or email to find out the availability of items requested by customers.
	8. Use communication software, like email.
	9. Decide whether to match a price offered by another store, if the price difference is not too big.
	10. Handle cash, credit card and debit card transactions, and provide change.
	11. Use a telephone appropriately and efficiently.
	12. Read comment cards or social media responses filled in / posted by customers.
	13. Read company guidelines about inventory control.
	14. Fill in accident or incident report forms.
	15. Write phone messages and record quote information.
	16. Calculate discounts, taxes and currency exchange.
	17. Read notices about policies, procedures or benefits.
	18. Greet customers and make general conversation.
	19. Observe suspicious behaviour by customers. Call security or stick close to the person to prevent a possible theft.
	20. Read model numbers on products.
	21. Prepare invoices for customers.
	22. Write delivery information clearly on packages that are to be picked up by courier.

	23. Read and interpret sales statistics, comparing sales over various periods of time.
	24. Interact with customers to explain the features of products, respond to customers' questions and encourage them to make the purchase.
	25. Organize special events such as fashion shows or special sales.

Additional skills

In addition to the basic skills required in retail occupations, employers today are looking for skills to fit the new workplace. There are more responsibilities, and changing rules and regulations. The following is a list of skills that employers are looking for, both traditional and additional skills. If you have any of these additional skills, make sure you mention them in resumes and interviews! While these skills may be general, they are the skills that all employers in Canada consider to be necessary.

Traditional Skills and Attributes	Additional Skills and Attributes
<ul style="list-style-type: none"> • Willingness to learn • Strong organizational skills • Excellent oral and written communication skills • Ability to work on several tasks at a time (multitasking) • Ability to work well with people • Good judgment • Flexibility • Professional appearance 	<ul style="list-style-type: none"> • Ability to prioritize • Experience using the Internet • Writing for different purposes, e.g. emails, using spreadsheets • Product knowledge • First Aid certification, WHIMIS • Research skills • Personal initiative

Learning Activity #2

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

1. Which of the above traditional and additional skills are you familiar with? How do you perform them? Complete the following sentences, using two skills or attributes for each sentence that has been started for you. Provide as much detail as possible.

I am able to...

I have some experience...

I need to learn more about...

Some of the places I would like to work are...

2. Write a simple cover letter to an employer describing your abilities to do the duties of a professional retail associate. Use some examples of additional skills as well as traditional skills. Write a minimum of ten sentences. Remember to provide a proper greeting and closing remark that show professionalism and dedication to your future job. If you can, use a laptop or computer to write your letter.

Unit 2 – Store Maintenance

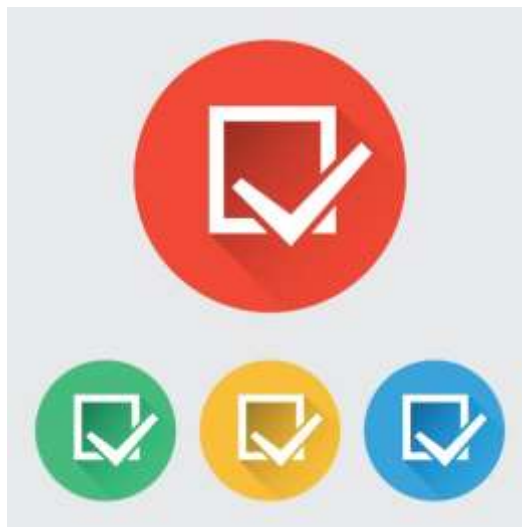
Store maintenance is required in all stores. If you work in a small retail shop, one person may do many of the tasks. In larger stores, specific departments and the staff who work in those departments may divide the tasks up. In an optical store, the emphasis may be on spotless eyeglasses. In a grocery store, the emphasis may be on having the shelves stocked at all times.

Inventory

Inventory is the goods that a store has to sell. Inventory records are important so the business is able to track the dollar value of all their merchandise. Keeping inventory records also tells the store when to order more products. Once a product is sold, the records will be adjusted to show how many of that item remain in the store and if it needs to be reordered from the supplier.

When goods arrive at the store, an invoice or packing slip will be included with the shipment, or it can be emailed to the store as well. The invoice is a complete list of the merchandise, goods, or services sent to a buyer by the seller, which also includes quantity, price, and the amount owing. The packing slip may not have the price of the items or the total. The content of the shipment has to be verified using the invoice or packing slip. Once this is done, the goods are priced and the information is entered into the inventory program. The inventory program allows the retail staff to find information about what items are in stock, where they are located, and the price of each item.

The merchandise is then stocked on shelves or displayed on racks. It is important to display the goods according to the store guidelines. In a grocery store, for example, the product labels should be facing outward so that the customers can see the front of the packages or cans. In clothing stores, sizes and similar items should be grouped together. This makes it easier for customers to find the item that they are looking for.



Learning Activity #3

After reading the invoice, complete the questions.

JOHNSON'S DESIGNER FASHIONS			
Invoice <hr style="width: 40%; margin-left: 0;"/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 123 Sunny Avenue Appletown, ON 02/05/19 K1K 1A2 </div> <div style="width: 45%;"> Invoice number: 10 Invoice date: </div> </div>			
Description	Quantity	Rate	Amount
Girl's dress size 4	12	\$19.99	\$239.88
Girl's dress size 6	10	\$19.99	\$199.90
Girl's dress size 8	12	\$19.99	\$239.88
We always appreciate your business!			
		Sub-total:	\$679.66
		HST:	\$88.36
		Total:	
Bill to: 123 Suppliers 888 Right Street Cablecon, ON			

1. How many dresses arrived in this shipment?

2. What is the price charged for each dress?

3. What is the total price charged for the entire shipment?

4. Two of the dresses were ruined during shipping. What would you do?

Store Displays

Store displays play an important role in displaying and selling a store's merchandise. Retail stores are competing for the customers' business. Clear and professional looking signs and attractive window displays will bring in customers. Customers have many stores where they can shop. A messy storefront display may give the impression that the merchandise in the store is not top quality, and this may cause a customer to shop somewhere else.

Displays show off the store's merchandise. Some displays are permanent and usually stay in the same place. Glass jewellery cases require constant cleaning so that fingerprints and smudges don't make the merchandise look unattractive. The front shelves of the grocery aisle usually carry the weekly features. Keeping the shelves stocked and neat in appearance can help make the products look more appealing. Clothes hung neatly and organized on the racks will assist the customer in finding the right size. The customer will appreciate being able to see the display without having to step around clutter.

Seasonal displays feature items for special occasions. They are temporary and will be changed often. Suppliers often have display units for their seasonal merchandise. These units could be cardboard pieces that have to be put together. They will come with instructions on how to assemble them. Read directions carefully so your display is safe and sturdy.

Tips for making a display look great:

- Proper lighting
- Make the display attractive from all angles
- Keep displays clean and clutter-free

Learning Activity #4

Think of three occasions when a store would have a seasonal display. What items could be in those displays?

Customer Service Areas

Large retail stores will often have a customer service desk. A customer service desk will usually provide general information and deal with returns, exchanges, layaways and special orders.

At the customer service desk, you will encounter a broad range of questions, such as:

- Do you sell hammers?
- Where are the washrooms located?
- Where do I find the children's section?
- This toaster is defective. Can I get my money back?
- Will you be getting any more sheet sets that were advertised on sale?
- I can't find the matching cups to my dish set. Can I order them?
- I have a competitor store coupon for skates. Can I use it here?
- The table you have on display is chipped. Can I get a discount?
- Can I make a payment on my store credit card here?

You will have to be familiar with the store's products and where they are located. If your store does not stock the item that the customer is looking for, provide information about where they can get the product. The customer will appreciate your helpfulness. It is important for you to know the store's policies regarding returns and exchanges. Knowing how your store deals with price matching with competitors, details about special sales events and how to discount damaged merchandise will allow you to answer customer questions easily. You will also handle phone calls from customers looking for information. Your courteous manner when you deal with customers will encourage them to keep shopping at your store.

Other duties at the customer service desk may include re-tagging merchandise that has been returned and putting these items back in stock. Defective merchandise will need to be returned to the supplier. It's always handy to let the customer know about the store's website and social media presence as well.

Learning Activity #5

This is an example of a rain check issued for an out-of-stock item.

Rain Check Certificate					
<u>Jacob's Discount</u> As a result of not meeting the demand for the advertised merchandise, this rain check will entitle you to the item listed below. We will be pleased to notify you by telephone or email when the merchandise is available.					
Item Description		Store No.		Div. No.	
Winter Sport Jacket		13		5	
Stock No.	Qty.	Size	Colour	Reg. Price	Promo. Price
45832-4530	1	Large	Black	\$79.99	\$39.99
Transaction Date:	November 4, 2019				
Name: Jamie Little					
Address: 456 Any Street					
City: Picton		Province: Ontario		Postal Code: K0K 2T0	
Phone: 333-555-5666 / Email: abc@abc					

The winter sport jackets that were out of stock have now arrived.

Write down the information that you will share with the customer when you call or email to tell them that the merchandise is now in the store.

Clean up tasks

Having a well-maintained and clean store is good for business. The products look more attractive to the customers. It is just common sense to clean up a spill when it occurs, hang up a piece of clothing that has fallen, or wipe down a sticky counter. That kind of attitude will create a positive work environment.

Some clean-up tasks need to be completed on a regular basis. Most stores will have a clean-up duties checklist for their staff to follow. The types of clean-up duties will depend on what kind of store you are working in. Many larger stores will hire a separate cleaning company for many of the cleaning functions, while others rely on the staff to do this work.

Having a list will eliminate the problem of relying on the next person to complete the task or simply forgetting to do an assigned clean-up duty. Once the employee has completed the task, he/she is required to initial it and mark the time.

Here is an example of what a checklist might contain for a convenience store.

Joyce's Convenience Store Clean-up Checklist					
	Shift start	Every hour	Shift end	Initials	Time
Clean glass front door	X				
Clean fridge and freezer glass doors	X				
Wipe down drink dispensing area		X			
Clean front counter		X			
Dust shelves	X				
Wash floor			X		
Clean drink dispensing equipment			X		
Organize newspaper and magazine racks		X			
Clean bathroom	X		X		

Learning Activity #6

You work at a medium-sized sporting goods store. Create a clean-up duties checklist that is appropriate for your store. The list should include tasks that are done on a daily basis and tasks that are done weekly. Where would you post the checklist?

My Clean-Up Duties Checklist



Unit 3 – Schedules, Payroll and Other Forms

Many positions available for retail associates will be shift work. Your supervisor will make a schedule for the staff. The schedule could be a weekly or monthly schedule. You need to know your schedule! It is a good idea to copy the schedule or add it to the calendar on your cell phone, so that you can refer to it when you are organizing your week. Many stores email the schedule to you or have it posted on their website so that you can access it with a personal password.

Another type of schedule that you may have to follow is a break schedule. This schedule is created so that all the employees are not on breaks at the same time.

Cashier Schedule

August 2 - 6, 2019

Employee	Monday	Tuesday	Wednesday	Thursday	Friday
Daniel	9:00am-3:00pm	3:00pm-9:00pm	10:00am-6:00pm	3:00pm-9:00pm	9:00am-6:00pm
Lorraine	10:00am-6:00pm	9:00am-3:00pm	3:00pm-9:00pm		10:00am-6:00pm
Arif	9:00am-3:00pm	10:00am-6:00pm		3:00pm-9:00pm	9:00am-3:00pm
Sarah	3:00pm-9:00pm		9:00am-3:00pm	10:00am-6:00pm	3:00pm-9:00pm
Maria	9:00am-3:00pm	3:00pm-9:00pm		9:00am-3:00pm	9:00am-3:00pm
Yosef	10:00am-6:00pm		9:00am-3:00pm	10:00am-6:00pm	10:00am-6:00pm
Milos	3:00pm-9:00pm	9:00am-3:00pm	3:00pm-9:00pm		3:00pm-9:00pm
Christina	3:00pm-9:00pm	10:00am-6:00pm	10:00am-6:00pm	9:00am-3:00pm	3:00pm-9:00pm

Learning Activity #7: Cashier Schedule

After reading the cashier schedule, complete the questions.

1. How many shifts are there in one day?

2. What are the longest and shortest shifts?

3. Which employees have the most shifts for this week?

4. Calculate the number of hours that each employee works for the week.

5. Which employees are scheduled the earliest on Thursday?

6. How many more hours of work does Daniel have than Sarah?

Learning Activity #8

Hours of Work – Relief Periods

Shift	Total Hours	Lunch	Break	Paid Hours
9:00 – 3:00	6	1/2	1 – 15 mins.	5.5
10:00 – 6:00	8	1/2	2 – 15 mins.	7.5
3:00 – 9:00	6	1/2	1 – 15 mins.	5.5
9:00 – 6:00	9	1/2	2 – 15 mins.	8.5

1. Which shift has the most hours?
2. According to the cashier schedule, how many hours does Daniel get paid for that week?
Remember to subtract the amount of time given for lunches.

Automotive Centre

Period Ending April 28, 2019

Employee	Sun.	Mon.	Tues.	Wed.	Thur.	Fri.	Sat.
Aran	9:00 – 3:00	8:00 – 5:00		9:00 – 6:00	8:00 – 5:00	8:30 – 5:30	
Donna		9:00 – 6:00	8:00 – 5:00	8:30 – 5:30	9:00 – 6:00	8:00 – 5:00	9:00 – 3:00
Erik	9:00 – 3:00	8:30 – 5:30	9:00 – 6:00	9:00 – 6:00		9:00 – 6:00	
Martina		9:00 – 6:00	8:30 – 5:30		8:30 – 5:30	8:00 – 5:00	9:00 – 3:00

Learning Activity #9

Read the automotive centre schedule and answer the following questions.

1. How many employees are scheduled to work Sunday?
2. On which days is Aran NOT scheduled to work?
3. What time does Erik start work on Tuesday?
4. Which department is this schedule for?
5. How many employees are scheduled to work Monday and Friday?

Time and Earnings

For most retail jobs, you will be paid by the hour. Your earnings depend on the amount of hours you work and also the rate of pay you are receiving. To figure gross earnings, you do the following.

Hourly rate of pay [x] Hours worked [=] Gross Earnings

Regular pay plus any other pay makes up the gross earnings. This is the total pay before payroll deductions are taken out.

Example: Jacqueline earns \$14.00 an hour. She worked 30 hours this week. What are her gross earnings?

Solution: $14.00 \times 30 = 420.00$

Answer: Jacqueline's gross earnings for the week are \$420.00

Learning Activity #10

Using your calculator, find the earnings for each example below.

a. Hourly rate \$21.56
Hours worked 5.25
Earnings

b. Hourly rate \$15.00
Hours worked 30.50
Earnings

c. Hourly rate \$17.50
Hours worked 20.00
Earnings

d. Hourly rate \$18.00
Hours worked 10.75
Earnings

Learning Activity #11

Using your calculator, find the gross earnings of each individual below. Remember to show all your work, and answer in full sentences!

1. Angela is working at a convenience store earning \$14.00 an hour. Last week she worked a total of 23 hours. What are her gross earnings for that week?
2. Luka is being paid \$18.00 an hour as an assistant manager for a local retail store. He worked 32 hours one week, and the following he worked a total of 28 hours. What are his gross earnings for the two weeks?
3. Kai has just started a new job as a sales clerk at a convenience store, earning \$14.35 an hour. He has worked a total of 21 hours all week and is expecting his first pay cheque. What will his gross earnings be for that week?

Regular Earnings

For full time employees, a regular work week is between 35 and 40 hours. To find the total amount of regular pay, you must use this formula:

$$\text{Hourly Rate} \times \text{Regular hours} = \text{Regular gross earnings}$$

Learning Activity #12

Using your calculator, calculate each person's regular weekly gross earnings, using the formula given above.

<u>Employee</u>	<u>Hourly Rate</u>	<u>Hours Worked</u>	<u>Weekly Gross Earnings</u>
a. Wong, K.	\$14.00	30.5	_____
b. Ziggins, B.	\$15.50	25.25	_____
c. Gradulin, E.	\$16.00	37.5	_____
d. Sung, T.	\$19.00	37.5	_____
e. Metcalf, T.	\$14.25	40	_____



Overtime Earnings

When an hourly worker works more than the regular hours in a week, they are working “overtime”. To calculate the number of overtime hours, you must use this formula:

Total hours - regular hours = overtime hours.

Most employers pay “time-and-a-half” for overtime hours, meaning the employer pays 1.5 times the regular hourly rate.

To calculate the pay rate for overtime work, you must use this formula:

Hourly rate x 1.5 = overtime rate

Example: Jonathan Marks earns \$14.00 per hour. He is paid time-and-a-half for overtime, what will be his overtime rate?

Solution: $14.00 \times 1.5 = 21.00$

Answer: Jonathan Marks earns \$21.00 per hour for overtime.

Learning Activity #13

Using the information given, fill in the rest of the form.

Employee Name	Hourly Rate	Hours Worked			Gross Earnings		
		Total	Regular	Over time	Regular	Over time	Total
a. Omar	\$14.00	52.0	40				
b. Gabriella	\$15.50	32	25				
c. Mike	\$16.35	45	35				
d. Hannah	\$15.80	26	20				
e. Louis	\$18.00	35	32				

Pay cheque: Earnings and Deductions

A pay stub is a sheet of paper that comes with your pay cheque, stating the following information:

- Amount of money earned in a week
- Taxes and other deductions that were subtracted from gross pay

To calculate how much money you take home (net earnings), you must use this formula:

Gross earnings - Taxes - Other deductions = Net earnings

Learning Activity #14

STATEMENT OF EARNINGS AND DEDUCTIONS DETACH AND KEEP FOR YOUR TAX RECORDS				
Larry's Convenience		Employee: Lorie Ferris		SIN# 000-000-000
Cheque # 103651				
EARNINGS		DEDUCTIONS		
Hours Worked	Earnings	Income Tax	Other Deductions	
Reg. 40.00	600.00	\$95.46	E.I.	18.08
OT 3	67.50		CPP	22.31
Current Pay Period	Total Gross Earnings	Total Taxes	Total Other deductions	Net Earnings
19/19 – 19/25				

1. Using the above pay-stub, calculate the missing totals at the bottom of the form. Then find the Net Earnings. Don't forget to show all your work!
2. For regular hours, what is Lorie's gross pay per hour? (Earnings [?] Hours)
3. What is Lorie's Gross pay per hour for overtime (OT)?
4. Lorie contributes the same amount for her Employment Insurance each week. How much will she contribute in a year (52 weeks)?

Other Forms

Some of the other forms that you need to become familiar with are:

- Vacation/Time off forms
- Refund forms
- Rain check certificates
- Bank deposit slips
- Accident report forms

Requested Time Off

If you need time off, whether it is a day, a week, or longer, it is best to tell your manager or supervisor ahead of time. This gives the manager enough time to get a replacement while you're gone. Many places of business supply a form that you must fill out ahead of time and then submit to your boss.

Unit 4 – Store Policies and Procedures

Every retail store will have policies and procedures for their staff to follow. These guidelines will determine how employees should deal with layaways, returns and exchanges, and they may also include cash handling, and opening and closing procedures. When a new employee begins employment with a store, they are generally given a copy of the store policies and procedures to read and learn.

Layaways

Some stores offer a layaway plan to their customers. This is a convenient method of payment for the customers. Having a layaway plan could be the reason why the customer chooses your store to make their purchases. A customer is able to purchase goods by making a down payment, and then making weekly or monthly payments until the items are paid for. The retail store will hold the goods for the customer until all the payments are made.

A layaway agreement is a contract. The customer will sign this agreement. The agreement should include the following information:

- Name, address, telephone number and email of the store and the customer
- Transaction date
- Itemized list of the goods
- The service charge fee
- Amount of down payment
- Balance owed after each payment is made and dates that future payments are due
- Length of time goods will be held
- Your rights if you miss a payment

The policies dealing with layaways can differ from store to store. Here are some examples:

- A customer will lose their deposit and money paid if they do not meet the payment schedule.
- Layaway policies must be posted at cash registers where layaway transactions take place.
- All layaways must be picked up and paid in full four days before Christmas.
- A 10% deposit is required with a layaway.

Returns and Exchanges

At large retail stores, returns and exchanges are usually handled at the customer service area. In smaller stores, the cashier will probably handle the returns. There are a variety of policies for returns and exchanges. They range from “100% Customer Satisfaction” to “No Returns”. If the item was purchased online, then you must follow the guidelines for returning an item in the manner specified. Sometimes, the company will pay for the shipping when you return an item through the mail or through a courier service.

Below are some examples of different return and exchange policies:

- 100% satisfaction guaranteed
 - Return the merchandise with the sales receipt, and the money will be refunded.
- No refunds
 - Items can only be exchanged, or a store credit can be given.
- Final Sale
 - Usually this is for clearance items. No refund, no exchange, no store credit.
- Personal items
 - Personal items, such as undergarments, cannot be returned.
- Receipt or no receipt
 - If you have the receipt, you will receive the refund at the price printed on the receipt. If you don't have a receipt, you will receive a refund for the amount of the current price of that item.

Cash Handling

Cash handling procedures and policies are put in place to prevent theft, and for the employees' safety. Some stores require that cashiers balance and empty their tills after 30 or 40 transactions. This is so that large amounts of money are not accessible. Cashiers are expected to follow procedures at the cash register, such as never leaving an open cash drawer unattended. Another policy may be to display signs indicating that only limited amounts of cash are kept in the store.

Opening and Closing Procedures

All employees responsible for opening and closing the store should have access to written procedures. These policies are for employee safety as well as theft prevention.

- When opening the store, make sure that there are no suspicious people around your store.
- Check to make sure that no one has broken in. Inspect the outside of the building to see if there are any broken windows or doors. If there is evidence of a break-in, call the police and do not enter the store.
- If you are the first person to enter the store, immediately re-lock the door and turn off the alarm. Inspect the inside of the store for evidence of a break-in.
- Remove the cash drawers from the locked area, and prepare the cash registers for the day.
- Unlock the doors at the specified opening time.
- At closing time, make sure that all customers have left the store.
- Lock the doors and windows. Remove the cash drawers to the locked area.
- Set the alarm. As you exit, make sure that there are no suspicious people in sight. Lock the door.

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 4

A - Find and Use Information: A1.1 to A2.1

B - Communicate Ideas and Information: B1 to B3.1b

C - Understand and Use Numbers: C1.1 to C4.1

D - Use Digital Technology: D.1

F - Engage with Others

O

A

L

C

F



Retail Curriculum Module 5 – Retail Math

Module 5 – Retail Math

Unit 1: Money Math

The following is our Canadian currency:

	Five Cents = One Nickel = \$0.05		Five Dollars = One Five Dollar bill = \$5.00
	Ten Cents = One Dime = \$0.10		Ten Dollars = One Ten Dollar bill = \$10.00
	Twenty-five Cents = One Quarter = \$0.25		Twenty Dollars = One Twenty Dollar bill = \$20.00
	One Dollar = One Loonie = \$1.00		Fifty Dollars = One Fifty Dollar bill = \$50.00
	Two Dollars = One Toonie = \$2.00		One Hundred Dollars = One Hundred Dollar bill = \$100.00

Learning Activity #1

Write the amount of money:



1. = _____



2. = _____



3. = _____



4. = _____



5. = _____



6. = _____



7. = _____



8. = _____



9. = _____



10. = _____



11. = _____



12. = _____

Use a calculator to complete the following:

- A. Mona counted the money that she made from selling brownies at the local bake sale. In her cash drawer she had two five dollar bills, three toonies, and four quarters. How much money did she have in total? Write the answer using numbers, a decimal and a dollar sign. _____
- B. Arif delivers papers after school. At the end of the week he collects all of the money for his supervisor, and what is left over is his to keep as tips. This week, John kept three five dollar bills, four loonies, and six dimes. How much did he have in tips? Write the answer using numbers, a decimal and a dollar sign. _____
- C. Rose works in the mall as a cashier in a shoe store. At the end of a busy Saturday, she has to count her debit and credit card slips, and also the cash in her till. She had \$314.34 in debit transactions, \$427.89 in credit card transactions, 3 fifty dollar bills, 4 twenty dollar bills, 4 five dollar bills, and 6 toonies. How much did she have altogether (cash + transactions)? Write the answer using numbers, a decimal and a dollar sign.

- D. Mika found an old piggy bank in her closet that she forgot about. When she dumped the change out, she sorted all of the coins. She had seven loonies, five toonies, eight quarters, six dimes, and ten nickels. She needed an extra twenty dollars to buy her friend a birthday gift. Did she have enough money after counting her change?

Learning Activity #2

Show the amount of money in words. The first one is done for you.

1. \$3.50 – Three dollars and fifty cents
2. \$2.45
3. \$12.55
4. \$9.15
5. \$18.75
6. \$4.60

Learning Activity #3

Find the correct amount of change the customer would receive.

- | | | |
|----|---------------|-----------------------|
| 1. | Cost: \$9.60 | Amount given: \$20.00 |
| 2. | Cost: \$13.00 | Amount given: \$50.00 |
| 3. | Cost: \$37.50 | Amount given: \$40.00 |
| 4. | Cost: \$16.75 | Amount given: \$22.00 |
| 5. | Cost: \$8.35 | Amount given: \$10.40 |
| 6. | Cost: \$12.60 | Amount given: \$15.00 |
| 7. | Cost: \$63.90 | Amount given: \$80.00 |
| 8. | Cost: \$31.30 | Amount given: \$42.00 |

Learning Activity #4

Add the following money amounts.

$\begin{array}{r} \$7.20 \\ + 2.20 \\ \hline \end{array}$	$\begin{array}{r} \$5.44 \\ + 3.22 \\ \hline \end{array}$	$\begin{array}{r} \$19.04 \\ + 33.33 \\ \hline \end{array}$
$\begin{array}{r} \$8.85 \\ + 1.13 \\ \hline \end{array}$	$\begin{array}{r} \$120.99 \\ + 29.11 \\ \hline \end{array}$	$\begin{array}{r} \$87.44 \\ + 90.09 \\ \hline \end{array}$

Learning Activity #5

Subtract the following money amounts.

$\begin{array}{r} \$56.76 \\ - 4.44 \\ \hline \end{array}$	$\begin{array}{r} \$84.23 \\ - 41.22 \\ \hline \end{array}$	$\begin{array}{r} \$79.18 \\ - 5.18 \\ \hline \end{array}$
$\begin{array}{r} \$399.77 \\ - 88.54 \\ \hline \end{array}$	$\begin{array}{r} \$209.43 \\ - 59.41 \\ \hline \end{array}$	$\begin{array}{r} \$407.12 \\ - 312.11 \\ \hline \end{array}$

Writing Cents

Although we no longer use the penny (1 cent coin), you may have to write cents when you add up debit or credit card slips, if you are working as a cashier. There are two correct ways to express cents in numbers. For example, if you were to write fifty cents in numerical form, you could use either of the following forms: \$.50 or 50¢. A common mistake is to express it as .50¢. The meaning of this is fifty-one hundredths of a cent or half a cent. Write the following in numbers showing both correct methods.

Learning Activity #6

- | | | | |
|----|--------------------|-------|-------|
| 1. | Twenty-nine cents | _____ | _____ |
| 2. | Sixty-five cents | _____ | _____ |
| 3. | Fifty-one cents | _____ | _____ |
| 4. | Thirteen cents | _____ | _____ |
| 5. | Ninety-three cents | _____ | _____ |
| 6. | Four cents | _____ | _____ |
| 7. | Eighty-nine cents | _____ | _____ |
| 8. | Fifty-five cents | _____ | _____ |

Learning Activity #7

Circle the numbers that are written correctly.

- | | | | | | |
|----|---------|--------|----|---------|-------|
| 1. | \$0.57 | .57¢ | 2. | \$0.63¢ | 63¢ |
| 3. | 19¢ | .19¢ | 4. | .24¢ | \$.24 |
| 5. | \$1.99¢ | \$1.99 | 6. | 45¢ | .45¢ |

Learning Activity #8

Write each amount using a decimal. Remember to include the dollar sign!

1. Thirty-five dollars and seventy-five cents
2. Eight dollars and two cents
3. Thirteen dollars and thirty cents
4. Seventy-five dollars and two cents
5. Forty-one dollars and eleven cents
6. Thirty dollars and eight cents
7. Sixty-three cents
8. Ninety dollars and nine cents

Place Value

As a retail associate, you need to have a good understanding of place value because you will be working with money all the time. The understanding of place value is also important in calculating percentages, estimating figures and understanding sales tax.

Whole Numbers

Place value is the value of a digit that is based on its position in a number. When you add, subtract, multiply or divide whole numbers, you are working with numbers that are made up of digits. A digit is one of the following ten symbols used to write numbers: 0, 1, 2, 3, 4, 5, 6, 7, 8 and 9. For example, the number 5328 contains four digits: 5, 3, 2, and 8. Each digit in this number is located in a different place and therefore has a specific value.

The following place value chart shows the first four whole number place values. The number 5328 has been placed in the chart. The chart shows that the digit 8 is in the ones place, the digit 2 is in the tens place, the digit 3 is in the hundreds place, and the digit 5 is in the thousands place.

Thousands	Hundreds	Tens	Ones
5	3	2	8

When a 0, or zero, appears in a number, it has 0 of whatever place value it falls into. The number 502, for example, has a 0 in the tens place. The digits 5 and 2 in the number 502 have place values of 5 hundreds and 2 ones. The number 502 has 0 tens.

Rounding Decimal Numbers

When multiplying and dividing, some answers may show many decimal digits. When this happens, you will have to round your answer to the nearest hundredth, tenth, or whole number. The following are some pointers to help you round correctly.

- Look at the next digit after the place you need
- If the number is 5 or more, round your place up to the next higher digit
- If the number is 4 or less, keep the digit to the left the same
- Drop all the digits to the right of the place that you don't need

The following are some examples of rounding off. When rounding to two decimal places or, in money, rounding to the nearest cent:

10.373 rounds off to 10.37
10.379 rounds up to 10.38
10.376 rounds up to 10.38

0.099 rounds up to 0.10
2.90 rounds off to 2.90
19.99 rounds up to 20.00

The following are examples when rounding to the nearest dollar:

20.499	rounds off to 20
20.659	rounds up to 21
20.699	rounds up to 21

Learning Activity #9

1. Write the place value of each underlined digit.

$$\underline{6}3 = \underline{\hspace{2cm}} \text{ 3 ones}$$

$$1\underline{0}0 = \underline{\hspace{2cm}}$$

$$53\underline{4} = \underline{\hspace{2cm}}$$

$$12\underline{5}9 = \underline{\hspace{2cm}}$$

$$\underline{2}78 = \underline{\hspace{2cm}}$$

$$39\underline{0} = \underline{\hspace{2cm}}$$

$$4\underline{5}00 = \underline{\hspace{2cm}}$$

$$\underline{6}7 = \underline{\hspace{2cm}}$$

$$\underline{6}792 = \underline{\hspace{2cm}}$$

$$\underline{9}89 = \underline{\hspace{2cm}}$$

$$7\underline{1}2 = \underline{\hspace{2cm}}$$

$$\underline{2}398 = \underline{\hspace{2cm}}$$

2. Write each of these numbers.

- 3 tens + 1 one =
- 6 tens + 0 ones =
- 3 hundreds + 2 tens + 2 ones =
- 4 hundreds + 0 tens + 1 one =
- 5 thousands + 2 hundreds + 3 tens + 9 ones =
- 9 thousands + 0 hundreds + 8 tens + 7 ones =

3. Write each digit as the correct place value.

a. 83 =

b. 37 =

c. 56 =

Decimals

Decimals are numbers used to show quantities that are less than 1, or quantities between 2 whole numbers. A decimal shows part of a whole number. Numbers to the right of the decimal point are used to show amounts that are less than one. The chart below shows the value of a number in the first four decimal places.

Decimal	Value	Place Name
.1	$1/10$	Tenths
.01	$1/100$	Hundredths
.001	$1/1000$	Thousandths
.0001	$1/10,000$	Ten thousandths

The following place value chart shows the first four whole number place values and the first four decimal places. The number 305.2841 has been placed within the chart. The chart shows that the digit 3 is in the hundreds place, the digit 0 is in the tens place, the digit 5 is in the ones place, the digit 2 is in the tenths place, the digit 8 is in the hundredths place, the digit 4 is in the thousandths place, and the digit 1 is in the ten thousandths place.

Thousands	Hundreds	Tens	Ones		Tenths	Hundredths	Thousandths	Ten thousandths
	3	0	5	?	2	8	4	1

Zeros and Decimals

Zeros can be added to the right of a decimal without changing the value of that number. The following are some examples.

$$8 = 8.0$$

$$\$42 = \$42.00$$

$$7.3 = 7.300$$

Learning Activity #10

1. Rewrite the numbers below as dollars and cents, rounding to the nearest cent. Don't forget to add the dollar sign (\$) in the correct place!

$293.568 = \underline{\hspace{2cm}}$

$89.568 = \underline{\hspace{2cm}}$

$359.210 = \underline{\hspace{2cm}}$

$4.232 = \underline{\hspace{2cm}}$

$8.26 = \underline{\hspace{2cm}}$

$78.325 = \underline{\hspace{2cm}}$

$45.238 = \underline{\hspace{2cm}}$

$27.888 = \underline{\hspace{2cm}}$

$6.245 = \underline{\hspace{2cm}}$

$5.877 = \underline{\hspace{2cm}}$

2. Rewrite the numbers below rounding to the nearest dollar. Remember to add the dollar sign in the correct place.

$31.35 = \underline{\hspace{2cm}}$

$41.05 = \underline{\hspace{2cm}}$

$101.99 = \underline{\hspace{2cm}}$

$1009.87 = \underline{\hspace{2cm}}$

$4.61 = \underline{\hspace{2cm}}$

$73.49 = \underline{\hspace{2cm}}$

$81.50 = \underline{\hspace{2cm}}$

$50.51 = \underline{\hspace{2cm}}$



Learning Activity #11

1. Decide if the decimals are equal. Write = or \neq in each box.

$0.03 \underline{\hspace{1cm}} 0.030$

$41.14 \underline{\hspace{1cm}} 41.41$

$7.07 \underline{\hspace{1cm}} 0.70$

$14 \underline{\hspace{1cm}} 14.04$

$19 \underline{\hspace{1cm}} 19.00$

$309 \underline{\hspace{1cm}} 390$

$99.9 \underline{\hspace{1cm}} 99.90$

$40.600 \underline{\hspace{1cm}} 40.6$

2. Compare the decimals. Write $>$, $<$ or $=$ in each box.

$0.73 \underline{\hspace{1cm}} 0.83$

$0.50 \underline{\hspace{1cm}} 0.5$

$1.362 \underline{\hspace{1cm}} 1.363$

$8.08 \underline{\hspace{1cm}} 0.088$

$7.1 \underline{\hspace{1cm}} 7.01$

$60.6 \underline{\hspace{1cm}} 6.06$

$9 \underline{\hspace{1cm}} 9.00$

$1.5 \underline{\hspace{1cm}} 1.55$

$899.9 \underline{\hspace{1cm}} 899.89$

$44.4 \underline{\hspace{1cm}} 44.40$

Word Problems

The following questions are math word problems that will test your thinking skills. They are a mixture of addition, subtraction, multiplication and division problems. You may use a calculator to work out each problem.

1. Richard had to do a bit of shopping on the weekend. He spent \$24.45 at the hardware store, \$78.89 at the grocery store, and another \$17.00 at the movies that evening. How much did he spend in all? _____

Circle the operation you used: adding subtracting multiplying dividing

2. Jim's boss sent him on an errand to buy some pens for the office. He bought six black pens at \$1.75 each, and 10 blue pens at \$1.89 each. How much did Jim spend on pens?
- _____

Circle the operation you used: adding subtracting multiplying dividing

3. Chelsea started the day with \$120.00 dollars in her spending account. She used her debit card at the pet store and spent \$21.49, then she went to a restaurant and had dinner for \$31.25, and finally she bought some gloves that came to \$14.23. How much does Chelsea have left in her bank account? _____

Circle the operation you used: adding subtracting multiplying dividing

4. Ekon had to order new team jerseys for the basketball team he coaches. He has 12 players on his team and each player gets two jerseys, one for playing at home and one for when they play as visitors. Each jerseys costs \$30.00. How much does he have to spend on jerseys?

Circle the operation you used: adding subtracting multiplying dividing

5. Jim is playing a card game with five people, so there are six people in total. Each player gets the same amount of cards. The game requires 48 cards in total. How many cards does each player get?

Circle the operation you used: adding subtracting multiplying dividing

6. Asha has to deliver 120 pamphlets to houses in her neighbourhood in the span of one week. On Monday she delivered 22 pamphlets, on Tuesday she delivered 37, and on Wednesday she delivered 45 of them. How many does she have left to deliver?

Circle the operation you used: adding subtracting multiplying dividing

Percents

When you work in customer service and retail, the store or place of business you work at will often have sales. Most of the time, the sale price will be a percentage taken off the regular price. When you scan the item, the POS system will have taken the percentage off of the item since it has been entered into the computer system already. Many stores can do this from a remote location through the computer.

It is still good practice to know how to do this with a calculator, just in case a customer (or you) wants to know the total price before he or she buys it. Most calculators (and cell phones!) have a percent key which makes figuring out percentages a lot easier.

Example: A chair is on sale and the regular price is \$89.99 but, for a week, there is 15% off of the regular price.

On a calculator: $89.99 - 15\% \dots 76.49$. Do not hit the equal sign key! The new price is \$76.49.

The percent sign acts as an equal sign. There is no need to hit the equal key.

You can do the same procedure for items that may be going up in price. The only thing that will change is pressing the plus key instead of the subtract key.

Example: Ray heard that the brand of coffee he likes will be going up 5% next month. He pays \$1.75 for his coffee now and wants to know what the new price will be.

On a calculator: $1.75 + 5\% \dots 1.84$. Remember, don't hit the equal key! The new price is \$1.84.

Practice

Try these questions involving discounts and price increases using a calculator.

- a) Amina saw a couch she liked at the local furniture store. The couch had a price tag of \$499.00 but there was a sticker that said "20% off the retail price". How much would Amina pay for the couch at the sale price? _____
- b) Mike knows the owner of a local bicycle store, and told the owner he was interested in a certain model bike. Sue, the owner, said the model Mike wants is on order, but because it is being shipped from Italy, there is a 12% increase on the regular price of \$249.99. How much will Mike pay with the increase? _____
- c) Raji is trying to decide which pair of headphones to buy. The pair by Acme is \$99.99 with 10% off, and the pair by Sonic is \$115.99 with 25% off. Which pair will cost less?

The Meaning of Percent

Percent means parts out of 100, so a whole percent stands for hundredths. For Example, 99% means the same as 0.99. Look at the equivalents below. You will begin to see a pattern.

	Percent	Decimal
From 1% to 100%	1 percent = 1%	= 0.01
	10 percent = 10%	= 0.10
	100 percent = 100%	= 1.00
More than 100%	101 percent = 101%	= 1.01
	110 percent = 110%	= 1.10
	200 percent = 200%	= 2.00
Less than 1%	$\frac{1}{2}$ percent = 0.5%	= 0.005
	$\frac{1}{4}$ percent = 0.25%	= 0.0025

Equivalent Percents and Decimals

To find equivalent percents and decimals, you can convert them in your head. Below is a simple way to do this.

Percent to decimal: Divide by 100

$$\boxed{?} \quad 43\% \text{ is } \frac{43}{100} = 0.43$$

Decimal to percent: Multiply by 100

$$\boxed{?} \quad 0.43 \text{ is } .43 \times 100 = 43\%$$

Learning Activity #13

1. Write each percent as a decimal. Do not use a calculator! The first one is done for you.

a. 19% = $\frac{19}{100}$ = .19

f. 55% = _____

b. 15% = _____

g. 61% = _____

c. 25% = _____

h. 80% = _____

d. 37% = _____

i. 33% = _____

e. 75% = _____

j. 8% = _____

2. Write each decimal as a percent. Remember, do not use your calculator! The first one is done for you.

a. 0.25 = $.25 \times 100 = 25\%$

f. 0.70 = _____

b. 0.85 = _____

g. 0.55 = _____

c. 0.32 = _____

h. 0.63 = _____

d. 0.45 = _____

i. 0.99 = _____

e. 0.01 = _____

j. 0.06 = _____

Sales Tax

The sales tax is applied to the price of a consumer good that is purchased. The retail store or service establishment must charge the sales tax for the goods and services they sell, and then send it to the government.

Most often, a cash register or a computer will figure out the tax rate for you. This lesson will show you how to work with sales tax using your calculator.

Finding the Sales Tax

The sales tax on an item is a percentage of the sales amount. To calculate the tax, simply multiply the sales amount by the tax rate.

Sales Amount x Tax Rate % = Sales Tax

With your calculator you do not need to change the tax rate from a percent to a decimal. You can use the [%] key, and it will calculate it all automatically for you!

You also don't have to press the equal key because the calculator already displays the answer when working with the percent function.

Example: What is the 7% sales tax on a sweatshirt that is priced at \$65.24?

Solution: $65.24 \times 7\% = 4.57$

Answer: The sales tax on the sweatshirt is \$4.57.

Learning Activity #14

1. Calculate the sales tax on the following items. Round to the 2nd decimal place.

	Amount	7% Sales Tax	9% Sales Tax	13% Sales Tax
a.	\$50.00			
b.	\$3.00			
c.	\$2.99			
d.	\$9.49			
e.	\$624.95			
f.	\$11,959			
g.	\$123.399			

2. Do you think knowing how to figure out sales tax is valuable? Explain why. List some examples of how figuring out sales tax can help you.



Adding the Sales Tax

To find the total including tax, you must first know how to enter the tax correctly into the calculator.

Example:

If the price of an item is \$10.99 and there is 9% sales tax, you would enter the question like this:

$$10.99 \times 1.09 = \$11.98 \text{ (rounding up to the nearest cent)}$$

Remember your place value! You key in 1.09 because you must represent every dollar in the price of the item.

If the sales tax on an item is 13%, then you would enter the question like this:

$\$22.99 \times 1.13 = \25.98 (rounding to the nearest cent). However, since Canada no longer uses the penny coin (one cent), a cash payment would be rounded to the nearest nickel (that is, \$26.00).

Debit and credit card transactions will still include the actual total, without rounding to the nearest nickel.

Harmonized Sales Tax (HST)

The HST is the tax collected by the provincial government. In 2019 in Ontario, there is 13% retail sales tax on most goods and services. Other provinces may charge a different rate of retail sales tax. Some goods and services are taxed at a higher or lower rate. There are some goods and services, such as food for human consumption, that are exempted from the HST. A listing of tax rates applied to goods and services and exemptions can be found on the Harmonized Sales Tax portion of the Government of Ontario website at <https://www.fin.gov.on.ca/en/tax/hst/index.html>.

When you purchase something, the taxes will be listed separately on the receipt.

Cash registers and POS systems will calculate the taxes automatically. Taxes can be programmed into the POS system or the cash register manually, but they are usually uploaded into the POS system from a main database. Both cash registers and POS systems have a tax exempt key that can eliminate the taxes for some specific purchases.

Learning Activity #16

1. Use one, two or three receipts that you can find and list the following information.

	Store #1	Store #2	Store #3
Date			
Store Name			
Goods Purchased			
Sale Total			
Any Discounts			
Taxes			
Credit, debit or cash?			
Was the receipt easy to understand?			

2. Did all of the receipts have the above information on them?
3. List any similarities you noticed on the receipts.
4. List any differences you noticed on the receipts.
5. Do a search on the internet to see what items you do not have to pay taxes on in Canada.

Sales Tax Word Problems

Using a calculator, figure out the total cost, including tax, in each word problem.

- Chang bought a new TV that was on sale at a local electronics store. The TV was \$599.99 and there was 13% tax on the item. What did Chang pay in total?
- Sheila had to pick up some tools at the hardware store for her home renovation project. She bought a hammer for \$11.99, a screw driver set for \$17.99 and a ladder that cost \$49.99. Where Sheila lives, there is a 10% tax on these items. What did Sheila pay, including taxes?
- Mikhail and Maria are planning to buy a small cottage. The cottage they are interested in is listed at \$249,000.00. The province in which the cottage is located adds an 8% tax on real estate, which includes cottages. How much will they have to pay in total?

Exchange Rate

Whether it is tourists visiting or truckers passing through, Canadian retail stores welcome American dollars. Some stores in tourist areas depend on them. However, the value of the Canadian dollar and the American dollar are not the same. Retail establishments and service industries need to be able to exchange American dollars for Canadian funds. And, of course, Canada is a popular destination with tourists from other countries as well.

The exchange rate is the value of the Canadian dollar against the currency of other countries. On each business day, the Bank of Canada establishes the exchange rate. There is a specific rate to exchange American dollars to Canadian dollars, and other currencies as well.

Most stores will post the exchange rate so that customers are aware of the rate at the time of purchase. Some stores will change the rate daily, according to the rate charged by the Bank of Canada; others will change the rate on a weekly or monthly basis.

Depending on the store's cash register system, the transaction of exchanging money may be as simple as selecting "American funds tendered" from a menu selection. However, you may have to calculate and change the American money using the exchange rate.

Example:

American dollars (multiply by) current exchange rate = Canadian dollars:

$$\text{\$20.00} \times 1.3300 = \text{\$26.60}$$

Learning Activity #17

- Using the current exchange rate listed, change American money into Canadian dollars. Round to the 2nd decimal place.

	Current Exchange rate	American dollars	Canadian dollars
a.	1.4433	\$10.00	=
b.	1.2906	\$45.00	=
c.	1.3001	\$36.00	=
d.	1.2252	\$20.00	=
e.	1.4111	\$18.25	=

- Emir pays for his purchase with American money. How much money will he get back in Canadian funds? The exchange rate is 1.2942.

Purchase Total	Amount returned
a. \$80.00	=
b. \$100.00	=
c. \$10.00	=
d. \$33.00	=
e. \$50.00	=

Unit 2 – Cash, Credit and Debit Cards

Cashier Procedures and Cash Handling Policies

Every retail operation has its own cash handling policy or set of procedures which cashiers are expected to follow. These procedures are a very important part of your job since they involve sales transactions and money. Your employer will want to make sure that their employees are reliable, honest and ethical people. On a typical day, a cashier's duties will include the following:

- Be assigned to a register at the beginning of her/his shift and given a drawer containing money
- Count her/his float to ensure that it contains the correct amount of money and adequate supplies of change and small bills
- Either manually enter the price of each item into a cash register or use a scanner connected to a point-of-sale system
- Count the drawer's contents and compare the total with sales data at the end of the shift
- Separate and total change forms, return slips, coupons and other non-cash items
- Handle returns and exchanges
- Enter charges for all items and subtract the value of any coupons or special discounts
- Call a manager if the customer's debit or credit card is faulty
- Verify the age of customers purchasing alcohol or tobacco
- Issue a receipt to the customer and return the appropriate change
- Wrap or bag the purchase

A cashier's duties will vary depending on the store. The following are examples of different retail operational responsibilities:

- A supermarket cashier might be responsible for weighing produce and bulk items, and for returning unwanted items
- A convenience store cashier might use a variety of machines other than cash registers, and fill out orders according to the store's needs
- A movie theater or ticket agency cashier might operate ticket-dispensing machines and answer a lot of movie related questions
- Gaming change people and booth cashiers in casinos exchange coins and tokens. They may also operate a booth in the slot-machine area and supply change persons with money at the start of the shift, or count and audit money in drawers
- A bookseller cashier may be responsible for selling a discount card
- A department store cashier may not be responsible for processing any returns or exchanges. This may occur in a separate area by other staff.

The general process for the cashier in retail, during the point-of-sale (POS) transaction, is the following:

- Greet the customer in a friendly manner when they are approaching the cash register area
- Make sure that the customer is satisfied with his/her experience at the store. One way that many retailers do this is by having employees ask the customer a question such as, “Have you found everything you were looking for today?”
- Process the sale which generally involves the following steps:
 1. *Calculate the total sale and tell the customer the total bill*
 2. *Receive the form of payment, i.e. cash, cheque, credit or debit card*
 3. *Finalize the transaction by returning to the customer the correct change or their credit or debit card, and their receipt*
 4. *Wrap or place merchandise in bags*
 5. *Provide any relevant information to the customer; for example, specific return or exchange policies or an upcoming sale in the store*

Every retailer will have very particular guidelines for cashier procedures. This is a very important part of the job. The following points are general guidelines that will most likely be a part of what is expected from you in a retail business:

- Only assigned associates may operate the cash register during specific shifts. You may have to enter a password or PIN number that has been assigned to you. The assigned associate is totally responsible for the cash drawer.
- If you are assigned to the cash, you must count your cash drawer before the shift to verify the correct float amount.
- You must count your cash drawer after your shift in order to balance the cash accurately. Another associate or supervisor will verify the amounts in the cash drawer with you, at the end of your shift, by checking your calculations.
- At the end of your shift, calculate total payments received and verify this with your total sales.
- For your safety, it is important that you always keep your cash register drawer closed, except when making cash transactions.
- It is important that you always complete each sale separately and close the cash drawer after each transaction. This will decrease errors with your cash transactions.
- It is very important that you always complete each sale immediately. Do not put money aside to be entered at a later time and never combine sales transactions.
- Never make change from the cash drawer for yourself.
- Never cash your own or another associate’s pay cheque of any kind.
- Never use personal credit cards or debit cards in exchange for cash from the employer’s funds.

- U.S. money and other foreign currency collected from customers becomes the property of the employer and must be deposited into the bank. Associates cannot sell, buy or exchange U.S. money for their personal gain.
- During particularly busy times, make frequent drawer skims/pick-ups. Your employer will specify an amount that your cash drawer should not exceed. For example, you should never have any more than \$400 in your cash drawer, unless a different amount has been authorized.
- Your cash must balance to a certain plus or minus at the end of your shift.

Most retail stores will train cashiers on the job. New employees may spend their first day observing other employees and seeing how the store generally operates. The store manager will then assign trainees to a register with an employee. This employee will guide and show the new employee the different components of the cash register system.

Learning Activity #18

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

What are the duties of a cashier? Describe in detail the different parts of a typical day for a cashier.

Money

When you purchase something, how do you pay? It used to be easy. First, there was cash. Then, we could use a personal cheque. Then came the credit card, and we would be asked, “Will that be cash or charge?” Credit cards let us purchase items and pay later. Some stores have a layaway system that allows you to do the same thing. With credit cards, if you don’t pay off your monthly bill, you pay interest on your purchase price. When we purchase an item with a debit or credit card, the cash is immediately removed from our bank account. There are also “special” credit cards that you can only use in particular stores, like Canadian Tire or Home Depot. These also charge interest on all of your purchases.

Cash

Money is very important in our society. When you are calculating how much is in a cash drawer, you have to be extra careful to be accurate. Here is a fast and simple way to find the total, making sure of accuracy at the same time.

Learning Activity #19

- Sort the coins and bills into separate piles
- Find the amount for each kind of money
- Add up these amounts to find the total of your cash

Find the number of each coin and bill (currency) in the cash drawer. Then find the total. Try not to use a calculator.

Value [x] Number [=] \$Amount			
Nickels	\$ 0.05	60	
Dimes	\$ 0.10	50	
Quarters	\$ 0.25	20	
Loonies	\$ 1.00	32	
Toonies	\$ 2.00	16	
Fives	\$ 5.00	15	
Tens	\$ 10.00	4	
Twenties	\$ 20.00	3	
Total coins and currency:			\$

Cash Register and Cashing Out

A cash register tape is used as a record of sales and transactions. Here you will prove that your cash amounts match with the register tape.

Learning Activity #20

Using your calculator, fill in the missing amounts below.

Transaction Summary Sheet.

Coins (total)	\$	10.85
Currency (total)	+ \$	525.00
Cheques, debit and credit card transactions (total)	+ \$	256.65
Total cash in drawer	=	
plus cash paid out	+ \$	25.00
Total cash in drawer	=	
minus opening amount	- \$	200.00
Cash received	=	
Cash received (register tape)	- \$	617.54
Difference	=	

If your cash balances, the difference will be zero. When the difference is more than the cash register tape, you are over. When your difference is less than the cash register tape, you are short.

Deposit Slips

To deposit money to the bank, you must first fill out a deposit slip. Here is an example of one.

Deposit all accounts		Your Bank		
Account Number		Date		
Name				
Cheques & Coupons		Cash		
		X1		
		X2		
		X5		
		X10		
		X20		
		X50		
		X100		
		Total cash		
Total cheques & Coupons		Cheques and Coupons brought forward		
Received in cash, which is deducted from this deposit				
Signature		Total Cash & Cheques		
Deposit initials		Total Deposit		

Filling out the Deposit Slip

In the top yellow section:

- Print the company account number
- Print the date
- Print your name

In the middle green and blue section:

- If you have money in the form of a cheque, print the amount in the “Cheques & Coupons” column. If you have more than one cheque, then print each amount on a separate line (green section).
- Print the total amount for cheques in the bottom of the “Cheques & Coupons” column (green section).
- Print the amount for cash and coin in the “Cash” column (blue section).
- Add up the total amount of cash and coins and print it in the dark blue section.

In the bottom orange section:

- Add the amount of cheques to the amount of cash, and print the total beside “Total Cash & Cheques”.
- Print the total amount of money you are depositing beside “Total Deposit”.
- Sign your name
- Write your initials, so the bank knows who deposited the money.

Learning Activity #21

Fill out the blank deposit sheet on the next page with the information shared below.

Cash		
<u>Coins</u>	<u>Currency</u>	<u>Debit/Credit Slips</u>
15 nickels	8 fives	20.69
6 dimes	7 tens	56.68
10 quarters	6 twenties	100.56
9 loonies		
3 toonies		

Deposit Slip for Activity 21

Deposit all accounts		Your Bank	
Account #		Date	
Name			
Cheques & coupons		Cash	
		X1	
		X2	
		X5	
		X10	
		X20	
		coin	
		Debit slips/Credit card slips	
Received in cash, which is deducted from this deposit			
Signature			
Deposit Initials	Total		

Parts of a Cheque

Although cheques aren't used often anymore, it is still good practice to know how to fill one out.

1.	Lotta Money	4.	456748932	5.	2051
	34 Money Ln. Ph. 689-5678		Date	3.	
	Anytown, BA 89000				
	Pay to the order of	2.		\$	10.
6.	YOUR FINANCIAL INSTITUTION	8.			Dollars
	For	7.		9.	

1. Name, address and phone number of the person writing the cheque
2. Name of the person (or place) to whom the cheque is being written
3. Month, day and year on which the cheque was written
4. Bank identification number
5. Cheque number
6. Name and Address of the bank
7. What the cheque was written for
8. Amount of the cheque (written out in words)
9. Signature of the person writing the cheque
10. Amount of the cheque in numbers

Learning Activity #22

Fill in the cheque using the information provided below the cheque.

_____ _____ _____	4-56748932	_____ Date _____
Pay to the order of _____	\$ 	_____ Dollars
YOUR FINANCIAL INSTITUTION		
For _____		

John Hudson lives at 302 Grove Ave., Toronto, ON, L9P 6E3. His telephone number is (567) 345-2323. He opened a new chequing account on Monday, September 16, 2019, at the Bank of Montreal. Using the first cheque from his chequebook the next day, he bought \$83.00 worth of groceries at the ABC Supermarket.

Credit and Debit Cards

Why Credit and Debit Cards are Used

In today's marketplace, customers expect to have the option of using credit or debit cards when they purchase goods and services. This option allows the customer to make purchases without carrying around large sums of money. Most people find credit and debit cards to be highly convenient, compared to using cash or cheques!

The Difference Between Credit and Debit Cards

Banks issue debit cards. They are directly linked to the customer's bank account. When customers use their debit card, their payment is automatically deducted from their bank account and moved to the store's bank account. The debit card is swiped through a "reader", and the customer enters the relevant information on the card reader keypad. The customer is not required to sign any transaction. The sales transaction will not be completed if the funds are not available in the customer's account. Some cards also offer a "tap" feature that lets the customer tap his or her card on the POS hand-held card swiper, without any PIN number being required.

Credit card companies issue credit cards. VISA, MASTERCARD and AMERICAN EXPRESS are just a few of the credit cards that are available. As well, there are special credit cards that can only be used in particular stores, such as “Canadian Tire” or “The Bay”. This method of payment allows the customer to have a “pay later” option. The credit card company will bill the customer directly for the payment. Interest charges will be applied if the customer does not pay within a certain time limit.

Debit Card Transactions

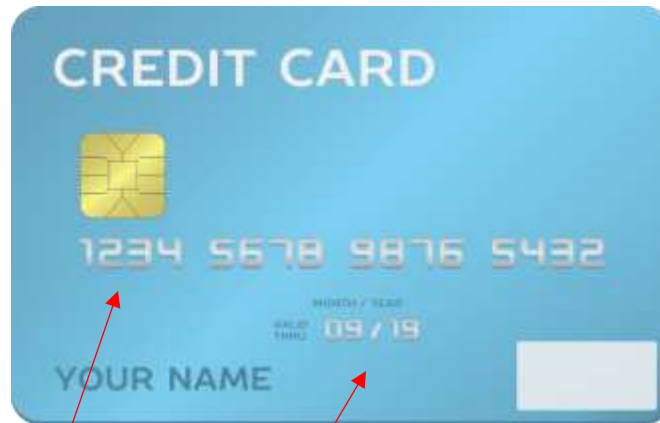
- The cashier or customer swipes the debit card through a reader, or taps it.
- The cashier enters the sales information.
- The customer uses the card reader keypad to enter the required information, or uses the tap feature.
- The transaction is either approved or denied.
- If the transaction is approved, a receipt is given to the customer.

Credit Card Transactions

- The cashier swipes the credit card through a reader.
- The reader automatically sends information to an authorization centre.
- The transaction is either approved or denied.
- If the transaction is approved, the customer will get the transaction receipt.



What Do Credit and Debit Cards Look Like?



Credit Card – Front

- Your account identification number
- Expiration date of the card

Back (Both)

- Magnetic strip that holds your account information and personal identity
- Signature of the cardholder
- Four-digit personal security number
- Customer Service numbers



Learning Activity #23

Answer the following statements by circling True or False.

- | | | |
|---|---|---|
| T | F | Customers always prefer to pay cash for their purchases. |
| T | F | Debit card payments are deducted from the customer's bank account. |
| T | F | Credit card payments are deducted from the customer's bank account. |
| T | F | The customer must sign the credit card transaction. |
| T | F | Some stores offer their own version of credit cards. |
| T | F | Interest charges apply to both credit and debit card purchases. |

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 5

- A. Find and Use Information: A1.1 to A2.2
- B. Communicate Ideas and Information: B1.1 to B3.2b
- C. Understand and Use Numbers: C1.1, C4.1, C1.2, C4.2
- D. Use Digital Technology: D.1, D.2

O

A

L

C

F



Retail Curriculum Module 6: Health and Safety

Module 6: Health and Safety

Health & Safety

In this module, you will learn about the laws that protect workers in Ontario. These laws include employment standards, human rights, health and safety, and workers' compensation.

Real stories...

Did you know? While the typical vacation for North American workers is two weeks, many European governments have laws that give workers longer vacations. French employers must give workers 25 vacation days per year. German workers can take up to 24 days. In Spain, workers have 22 days.

Employers in Belgium, Ireland, and the Netherlands provide 20 days, and in the U.K., vacations are from 15 to 20 days.

(Source: Society for Human Resource Management, 2000)

Learning Activity #1: Discussion

Discuss each of the following situations.

1. John works an eight-hour workday. His boss approached him and said that he could not take any 15 minute breaks this week because the store is too busy. Is his boss allowed to do this?
2. Anne was asked to wear black pants and a white top while working as a server at a restaurant. Can the employer do this?

Laws that Protect Workers in Ontario

The Ontario Ministry of Labour is responsible for labour laws in Ontario. These laws describe the rights and responsibilities of employers and workers in this province.

Ontario's Employment Standards Act

As a new worker, you need to learn about these laws so that you know your rights and responsibilities in the workplace.

The Employment Standard's Act is updated periodically, so please be sure to regularly consul the Act for the latest information. Here is the link: www.ontario.ca/page/ministry-labour



Employment Standards Act is the law that contains Ontario's basic rules about the minimum standards for salary, overtime, vacations, maternity benefits, termination, and more. This provincial law covers most workers in Ontario. These laws set the standards for employment-related activities, including:

- Minimum wage
- Hours of work
- Overtime pay
- Breaks
- Public holidays
- Vacation pay
- Pregnancy and parental leave and benefits
- Sick leave
- Termination of employment

Learning Activity #2: Vocabulary matching

Test your understanding of employment standards by matching the terms with their definitions below.

1. _____ Minimum wage
2. _____ Hours of work
3. _____ Overtime pay
4. _____ Meal breaks
5. _____ Public holidays
6. _____ Vacation pay
7. _____ Deductions
8. _____ Termination of employment

- A. Payments that employers deduct from an employee's paycheque
- B. The wage that employers must give workers who work more than the normal hours of work in a work week
- C. Employers must pay at least this much to part-time and full-time employees
- D. Firing or giving notice
- E. Time off or the equivalent pay
- F. The number of hours for each normal working day
- G. Time available for breakfast, lunch, or dinner, depending on your work schedule
- H. Days of rest, recreation, or festivity



Learning Activity #3: Interview

Work with a partner to fill in the chart with information about Ontario's employment standards, and then ask your partner about workplace law in other countries.

Use the Internet to do this activity.

Question	In Ontario	Found in...
1. What is the minimum wage?		
2. How many weeks of vacation do most workers get each year?		
3. How many public holidays are there?		
4. What are the normal working hours each week?		
5. What are the normal working hours each day?		
6. Are employers required to pay overtime?		
7. What are some deductions from paycheques?		
8. Is there maternity and parental leave? How long is it?		

Learning Activity #4: Using a Job Bank

Using the internet, look at some job postings in your area. Try the Job Bank and/or Indeed.com. Does the job list:

1. The wage for the job? _____
2. How to apply? _____
3. Is there a dress code? _____
4. Do you need any certification or special training? _____
5. Do you need any special work wear? (hard hat, safety boots, etc.) _____
6. Does the job specify the hours to start? Is it a night time job? _____
7. What days of the week does the job need you? _____

Human Rights In The Workplace

Ontario Human Rights Code

The Ontario Human Rights Code is the law that says all citizens in Ontario must receive equal and just treatment. The Code protects workers in Ontario from discrimination and harassment by their employers or co-workers. It also reminds all workers to treat each other with respect.

The Ontario Human Rights Code forbids discrimination against a person because of race, colour, religion, gender, sexual orientation and more. Employers and workers must act accordingly to the principles described in this law. For example, it is illegal to sexually harass people or to make jokes about people of different races.

Learn more at: www.ohrc.on.ca/en/ontario-human-rights-code.

Discrimination

Discrimination is being treated differently from other people. It is against the law to discriminate against people because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, age, record of offences, marital status, same-sex partnership status, family status, or handicap. This is why it is illegal for employers in Ontario to ask questions about an applicant's marital status, number of children, age, etc.

Harassment

Harassment is a situation in which someone threatens or insults you. Racial harassment includes racial jokes and rude comments. Sexual harassment includes unwanted touching, sexual comments, sexual jokes, and suggestions. Discrimination and harassment can occur in job advertisements, questions about Canadian experience, in job applications and interviews, and in the way workers treat each other and how the employer treats the workers.

Ontario Human Rights Commission

The Ontario Human Rights Commission is the office that enforces the Ontario Human Rights Code. Anyone who has been discriminated against or harassed in the workplace should try to solve the problem with the colleagues and employer, but if this fails, the commission can help.

Learning Activity #5: Vocabulary matching

Match the terms with their definitions below.

1. Ancestry
 2. Creed
 3. Family status
 4. Disability
 5. Harassment
 6. Marital status
 7. Place of origin
 8. Spouse
 9. Discrimination
-
- A. Being in a parent and child relationship
 - B. Derogatory comments and unwelcome advances
 - C. Physical or mental disability
 - D. The person to whom you are married or with whom you live as a couple
 - E. Single, married, divorced, common law
 - F. Relatives from many generations back
 - G. Where you were born
 - H. Being treated differently from others
 - I. Your beliefs, especially religious

Learning Activity #6: Discussion

Talk with a partner about questions that an employer might ask in a job interview or job posting. What is a statement that you might see in a job ad that would be against the Human Rights Code?

What do you think?

Brittany was called to come in for an interview regarding a job that she applied for. She was very excited because she hadn't been working for quite some time. After the interview was over, Mr. Davis, the man interviewing Brittany, walked her to the door of the office and said he would let her know about the job in the next few days.

"So, do you have any kids Brittany?", he said.

"I have two young girls, a 4-year-old and a 6-year-old", she replied.

"Hmmm", he said. *"If I need you to work nights or weekends, do you have anyone that can watch your children?"*

Was it ok for Mr. Davis to ask this question? Explain your answer...

Learning Activity #7: Matching

Match each situation with one of the following types of discrimination or harassment:

P - Place of origin
C - Creed

R - Race
A - Age

G - Gender
D - Disability

_____ 1. Andy answered an advertisement on a job bank. The duties of the job involved typing, filing, and sorting. When he asked for an interview, he was told that the job was for "girls" only.

_____ 2. Ameena applied for a job as a receptionist. Ameena is East Indian. She speaks English very well, but she has an accent. At the job interview, the employer told her that she was not right for the job. He said that the company needed someone who spoke English with no accent.

_____ 3. Andrea speaks with a stutter. One of her co-workers makes fun of her when she stutters. He knows that this makes it harder for her to speak, but he does it anyway.

_____ 4. Nathan works in a machine shop. He is African American. Most of his co-workers are white. Last week his co-workers were telling African American jokes. Nathan asked them to stop, but they just laughed at him and went on with the jokes.

_____ 5. Ute has been looking for a job for almost two years. She can't understand why it is so difficult. Her friends say that it will be impossible for her to get a job because she is 60 years old.

_____ 6. Ahmed is a Muslim. He has a special prayer time every Friday and every Friday, one of his co-workers teases him, "There goes Ahmed to the mosque again!"

Adapted from: Discrimination and Harassment at Work, CLEO. August, 1993

Learning Activity #8: Discussion

Discuss the following situations and decide if the employer was right or wrong in their actions.

1. Gina got a job at a local restaurant. The job required her to wear a white top and a black skirt, and black shoes. For one shift, Gina showed up wearing a pale blue shirt and was told by the owner to wear her white shirt next time. A few shifts later, Gina showed up with same pale blue shirt again, telling her boss that her white shirt was in the laundry. He gave her another warning about the dress code. Two weeks later, she wore a brown skirt instead of a black one. Gina's employer dismissed her and terminated her job. Was this right?
2. Mandy began working a new office job. On Fridays, she would bring her young 5 year old daughter to work because she had no one to babysit her on that day of the week. Her daughter would sit on the floor beside Mandy's desk and quietly play games on her tablet. Mandy's boss called her into the office to tell her that she cannot bring her daughter to work, even though her child is quiet and not disturbing anyone. Is it ok for Mandy's boss to tell her this?
3. John works at a warehouse. Recently his car broke down and he had to take the bus to work. He asked his boss to re-arrange the schedule for the next two weeks while he gets his car fixed. John's boss said he couldn't as he needs John to work the specific shifts that he is scheduled for. Does John's boss have to fix the schedule to accommodate John?

Health and Safety

Occupational Health and Safety Act

The Occupational Health and Safety Act helps to protect the health and safety of workers in the workplace. This Act is based on the idea that employers and employees must work together to create a safe and healthy workplace. Here is a link to this important Act: <https://www.labour.gov.on.ca/english/hs/laws/index.php>

Employers must do everything possible to protect workers' health and safety, and workers must work with employers to identify and solve safety problems in the workplace.

The Act gives workers four basic rights:

- The right to participate in keeping their workplace safe and healthy
- The right to know about health and safety hazards through the workplace hazardous materials information management system (WHMIS)
- The right to refuse work that they think is unsafe
- The right to stop work

Occupational health and safety applies to all workplaces; however, some workplaces will have more health and safety hazards than others.

Learning Activity #9

Whose responsibility is it?

Circle **E** for employer (your boss or workplace) and **W** for worker (you) in front of each sentence, according to who is responsible. Remember that some answers can be both.

- | | | |
|----------|----------|---|
| E | W | 1. Give information, training, and supervision |
| E | W | 2. Not work or operate equipment in a way that could be dangerous |
| E | W | 3. Make sure safe work procedures are followed and equipment is used properly |
| E | W | 4. Report any broken equipment or safety devices |
| E | W | 5. Keep safety equipment in good condition |
| E | W | 6. Use the safety equipment available in the workplace |
| E | W | 7. Report any health or safety violations |
| E | W | 8. Provide training on how to handle hazardous materials |

Workers' Compensation

Workers' Compensation Act

The Workplace Safety and Insurance Act states that workers who are injured at work or get sick from their work can receive compensation and assistance to get back to work. The Workplace Safety and Insurance Board (WSIB) is the office responsible for administering workers' compensation. The WSIB also enforces the provincial occupational health and safety system. Learn more at www.wsib.on.ca

No injury is too small to report!

All employees must be registered with the WSIB. Employers must register any new employees with the WSIB within ten days of hiring, or they can be fined. Employers must also report any injuries that occur at the workplace to the WSIB within three days of the injury. Workers must report any work-caused injury to their employer immediately. If a worker misses work because of an injury or illness, the employer must report it to the WSIB within three days after the accident. Workers must also make a claim with the WSIB within six months of their injury. Although both the employer and the employee report any injury related to the job, employees must apply for workers' compensation, and the WSIB decides if the law covers a worker or not.

An Injury Situation...

Sue fell at work and hurt her knee. She could still walk but she was sore and worried that it might become worse if she stayed on it. She asked her boss if she could file an accident report and notify WSIB about her injury. He told her to keep working for the rest of the week to see if it might get better. He told her it was a very busy time of year and that losing her would hurt the company. She worked for a few more days and asked her boss again about filing the injury. Once again, her boss stalled and told her to "hang in there".

Activity #10: Discussion

1. Is Sue's boss breaking the law by hesitating?
2. What were the responsibilities of the employer in this case?
3. What should Sue do?

4. What will happen next?
5. What do you think the judge will decide?

Learning Activity #11: Review

Answer the following questions about safety and the workplace.

1. What does WSIB stand for? _____
2. If you are at your job and working outside, and you get a very bad sunburn during your shift, should you tell your boss?
3. Every time you plug in your power saw on the job, it works but there are a few small sparks when you plug it in the outlet? Should you just keep working?
4. You deliver papers in your neighbourhood and one of the houses you deliver to has a big dog tied outside who barks at you every time you walk up the driveway, so you skip this house. Should you tell your boss about the dog?
5. Your boss wants you to get up on a ladder and change all of the lightbulbs above your desk to a different brightness that is more cost effective. You are not a big fan of heights. What should you do?
6. You work in a factory and the earplugs that your supervisor gave you don't seem to be effective, as you can still hear the machinery and it is distracting you. He says it's the only earplugs they have. What can you do next?

Learning Activity #12: Quiz

How much do you already know about workplace law in Ontario? Work individually or in groups to select the right answers to the following questions about Ontario's employment standards. You may need to use the Internet to do this activity.

1. What is minimum wage?

- a. The wage an employer decides to pay you
- b. The lowest wage an employer can pay you by law
- c. The wage you get paid for weekend work

2. How many public holidays are there in Ontario?

- a. Five
- b. Twelve
- c. Nine

3. Who should be contacted if you get hurt at work?

- a. WBIS
- b. WISB
- c. WSIB

4. Which of the following can you be fired for?

- a. Sexual harassment
- b. Taking company supplies home without asking
- c. Constantly missing your scheduled shift
- d. All of the above

5. Can employers legally fire you if you complain about a safety problem at work?

Yes / No

6. A job advertisement can post that they only want females for the job.

True / False

7. Your employer tells you that you must come in to work on New Years day for your regular wage. Can the employer do this?

Yes / No

Learning Activity #13: Research

On the internet, take some time and research three jobs that you may be interested in. Try to search as many different sites as you can to find out about these questions. Answer all of the following questions for each of the three jobs.

1. What skills are required for the job

2. Do you have to work out of town or travel for the job?

3. What kind of shifts are they? Evenings? Graveyard (overnight)? Daytime? Weekends?

4. Do you require special training for these jobs as well as the required skills?

5. How do you apply for this job?

6. Is there a salary or wage-per-hour listed in the posting?

7. How will you get to this job if you are hired?

8. Do you know anyone in this area of work you can talk to or ask questions?

9. Do you need special work clothes or a uniform?

10. What will some of the challenges be if you get the job?

HINT! A good website to visit is the “Labour Market Information website of the Government of Ontario at: <https://www.ontario.ca/page/labour-market>.

Suggested Ontario Adult Literacy Curriculum Framework Milestones for Module 6

A - Find and Use Information: A1.1 to A2.2

B - Communicate Ideas and Information: B2.1 to B2.2

D - Use Digital Technology: any level

F - Engage with Others

O

A

L

C

F



Retail Curriculum
Module 7: Wrapping It Up –
Developing Your Personal Plan

Module 7: Wrapping It Up – Developing Your Personal Plan

In this module, you will begin to make a personal plan. Where do you go from here? What are the next steps that you need to take? Before you begin your job search, it is important to assess and evaluate your skills, training, and objectives. This will help you decide if you are ready for the workplace.

Self-assessment

A self-assessment allows you to:

1. Consider your personal characteristics
2. List your training, experience, and industry skills
3. Know what you want in a job
4. Make a list of the first steps



Personal Plan

Now that you have nearly completed this course, you have shown you have the essential skills needed to work in retail. Talk to your instructor about programming available through Employment Services and other service providers. They will give you the support you need to effectively look for work.

One way to make sure that you get where you want to go is to map out your journey by deciding on a few steps at a time. This is sometimes referred to as “setting realistic goals”. The list of questions on the next pages is based on the skills, knowledge, and training employers are looking for in retail associates.

The questions will help you think about your previous education, training, experience, skills, knowledge, and interests and help you make a plan of action.

Learning Activity #1

1. Assess your personal characteristics. Answer the questions below with a yes or no. These personal characteristics are seen as essential for successful retail associates. Where the answer is no, think about what you could do to change it to a yes. Are there courses you could take? If you need more information, can you do research or learn online via videos, podcasts, etc.? Could you volunteer to gain more skills or ask someone to mentor you? What services are available in your community to help you reach your goals?

Personal Characteristics and Work Ethics			
Questions	Yes	No	To change my answer to yes, I can ...
Do you have a good attitude and a positive outlook on life?			
Are you flexible with a schedule?			
Are you familiar with the dress codes used in retail positions?			
Are you organized?			
Do you get things done on time?			
Can you take advice from others?			
Do you adapt easily to changing conditions?			

Communication and Social Skills			
Can you communicate clearly and effectively in both orally and in writing?			
Are you confident in your customer service skills?			
Do you enjoy working with the public?			
Are you able to work well in a team setting?			
Do you know about workplace laws?			
Can you problem-solve in a variety of situations?			
Do you work well with supervision and independently?			
Are you okay with working alone?			

2. The following questions focus on your skills and training. First, go through all the questions and answer yes or no. Then, go back and look at all the questions where you answered no. Try to think about what you can do to gain this knowledge or these skills. Are there courses that you can take to help? Are there people at the learning centre you are attending who can help you? Are there ideas that you need to reconsider?

Technology			
Questions	Yes	No	To change my answer to yes, I can ...
How well can you use computers, Word, and digital technologies?			
Are you able to use the Internet to do research on competitors, send email messages, and research products?			
Are you ok with talking on the phone with customers?			
Can you use a cash register and/or Point-of-sale system?			
Education And Training			
Is customer service or retail a job that will motivate you?			
Do you think you need upgrading or extra training before your job search?			

3. Visit “Labour Market Information website of the Government of Ontario at: <https://www.ontario.ca/page/labour-market>. On this website, you will find a great variety of helpful online information, such as quizzes, job profiles, job futures and much more.
4. Visit online job search sites, such as the Job Bank and Indeed.com. Search retail jobs in your community. What does your research tell you? Are there plenty of jobs? Do your skills measure up?
5. Visit the free online learning website called GCF Learn Free at: <https://edu.gcfglobal.org/en/subjects/work/>. They have free modules on searching for jobs and how to put your best foot forward in the job market.
6. Make a short-term plan with one of the questions you answered “no” to. Choose four steps you feel you can realistically accomplish this year and record them below.
 - 1.
 - 2.
 - 3.
 - 4.

Training and Upgrading

Retail associates are lifelong learners. They always have to learn new product lines, discounts, specials, new inventory systems, new marketing plans, and other on-the-job training. Employers also send staff on short and long-term training. When you are not employed, your learning is independent learning.

Training and upgrading is available from community-based learning centres, local boards of education, community colleges, private training institutions, and universities. There are full-time, part-time, co-op programs, and continuing education programs. As well, there is the whole world of online learning. YouTube videos, podcasts, websites, and more, are all at our finger tips for high quality and often free learning opportunities!

Industry Knowledge

Sales professionals need to stay current on product development, future trends, and the economy. Retail sales associates need to know whether the economy is healthy or not. It would also be useful for them to keep up with buying trends and the latest technology. There are several Internet sites that track trends or give tips on customer service skills and how to be a good customer service and retail employee.

Computer Literacy

Retail associates use a variety of computer-related tools at work, such as computerized cash systems (POS systems) and bar code scanners. Basic computer literacy, such as the ability to use the Internet and email are now business essentials. Both public and private education centres offer computer courses. One of the best sites for free, online learning about technology is GFC Learn Free. You can build many of your digital skills here! See: <https://edu.gcglobal.org/en/subjects/tech/>

Volunteering

Consider giving your time through volunteering to build your skills. Volunteering can help you network with other people and could even lead to a paying job down the road. Not only are you helping others, but you are building your personal skills at the same time.

There are many different tasks you can do as a volunteer. You can be a board member of a non-profit organization, organize events, or provide telephone services. “Virtual volunteering” allows a person to perform volunteer work from a distance, using email, the web, telephone, or fax. For example, you could send out letters using a database on your home computer or make phone calls for an organization to let members know about an upcoming event. Volunteering is a great way to explore a new career path. It can give you a first-hand look at what it is like to work in a particular industry.



Visit the website of Volunteer Canada for more information about volunteering and its benefits: <https://volunteer.ca/>

Matching Retail Skills to Volunteering

There are a number of campaigns every year that are directly related to selling, marketing and retail skills. A few examples are listed below:

Daffodil Campaign
White Ribbon, Red Ribbon, Pink Ribbon

Find a cause that interests you!

Networking

Your network includes everyone in your life. Your network is probably much bigger than you think! People in your network can help you, and you can help them. You should learn what you can about each individual and acknowledge his or her skills, experiences, talents, and needs. The people you know are “warm” leads. It's much easier to build on that warmth by expanding your knowledge of these people, than it is to pursue “cold” leads. Give them an opportunity to learn more about you. Look at the chart below and think of how you could network with them.

Family:	Members of your family are individuals with skills and backgrounds. You can tap into their knowledge and their networks.
Friends:	Your friends have skills you may not be aware of, and they have their own networks. Ask to be introduced.
Neighbours:	Because you live close by, you have a chance to develop close relationships. Find out who your neighbours are.
Clubs or Associations:	If you are involved with any community associations or activities, you have a ready-made network. Most people join these groups to meet others. The door is already open.
Volunteer Groups:	One of the reasons people volunteer is to meet others. A lot of networking can occur through volunteering.
Acquaintances:	These are people who you meet in work and social settings. Don't waste the opportunity to begin friendships and networks this way. Ask each person you meet to tell you more about her or himself.
Hobbies	Consider your hobbies. Networking with others with similar hobbies is a great place to start!

Online Networking

Our digital world provides many opportunities for online networking. This could include via your Facebook page and via LinkedIn.

LinkedIn was specifically developed to help with online networking.



Networking and Skills Development

The following are some descriptions of the knowledge or experience that you want to find in someone when you begin networking:

Find people who ...

- Have experience in retail as an associate or in a supervisory position
- Have training in customer service
- Are skilled in digital technology
- Have excellent people skills
- Possess strong sales skills

Learning Activity #2

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

1. Everyone you know is part of your network. Name three people in your life, and describe how they can help you make future job connections.

2. What is the difference between a “warm” lead and a “cold” lead? Provide an example for each.