



RE|IMAGINE
Retail Chicagoland

CUSTOMER SERVICE & SALES FUNDAMENTALS

FACILITATOR GUIDE FOR CUSTOMIZED
INCUMBENT WORKER TRAINING



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An Important Note: Who Should Use This Guide?

This facilitator guide was developed to support training providers and retail professionals delivering the National Retail Federation Foundation's (NRF Foundation) *Basic Customer Service & Sales Fundamentals* curriculum. The guide was developed by trainers at Instituto del Progreso Latino, and is based on their years of experience teaching the curriculum, including customizing it for specific retail partners. The guide refers to the textbook and curriculum distributed and promoted by NRF Foundation from summer 2017 through August 2019.

In September 2019, NRF Foundation released a new version of the *Customer Services & Sales* textbook, curriculum, and exam, designed specifically for job-seekers. These refreshed materials include new media and videos, and enhanced information about the retail industry. As part of this update, some content from *Customer Services & Sales* – such as inventory, merchandising, and marketing – shifted to NRF Foundation's third credential (*Business of Retail: Operations and Profit*). An overview of the updated learning concepts and exam are available [here](#).¹

The *Customer Services & Sales* training can now be taken online, in the classroom or in a blended format. Updated textbooks and exams are available through the Penn Foster platform. Importantly, while some content has changed, the learning objectives tested on the *Customer Services & Sales* exam remain very similar. Existing NRF Foundation customers will have access to the previous exam through Penn Foster through September 2, 2020. The textbook referenced in our facilitator guide can also still be purchased by existing NRF Foundation customers.

Given these transitions, this facilitator's guide will be most relevant to training providers still using an older version of the NRF Foundation's textbook and curriculum, since specific page numbers and content are referenced throughout the guide. We know that many training providers will need time to purchase and transition to the new NRF Foundation materials, and we hope this guide can be a helpful resource along the way.

Those who are new to NRF Foundation credentials or who are already shifting to updated NRF Foundation materials will still find helpful and applicable information in this guide. For example, the guide includes detailed information on adapting NRF Foundation training for incumbent workers (rather than job-seekers) and for customizing the training to meet a specific retail business need. This includes guidance on how to talk with retail representatives about their training needs before developing a course, and how to reconnect after a course to assess outcomes and plan future training. These steps can help a trainer make the NRF Foundation curriculum more relevant to a particular store – its workplace practices, products, culture and values – and its workforce. The guide also offers teaching tips for trainers new to course facilitation, including information on teaching methods, assessing and responding to learning barriers, and designing activities such as role plays.

¹ <https://nrf.box.com/s/a687pflobv6aot30cqp5rh3dwd0as371>

We hope you find this resource useful in your work, and we look forward to learning from your experience with it. As training providers and retailers around the country transition to the NRF Foundation's exciting new offerings, we will look for opportunities to develop additional supplemental materials to support retail worker advancement.

To find out more about NRF Foundation's transition, [click here](#)² to watch a webinar, or visit their [website](#)³ with FAQs about updates to training. If you have feedback or questions about this facilitator guide, please email us at ReimagineRetailChicagoland@chicagoworkforcefunders.org.



² <http://streamstudio.world-television.com/CCUIv3/frameset.aspx?ticket=819-1558-21961&target=en-default-&status=ondemand&browser=ns-0-1-0-0-0&stream=html5-audio-32>

³ <https://nrfoundation.org/faqs-nrf-foundation-training-update-0>

Prologue

This **Facilitator Guide** was developed to assist training providers and retail professionals who might be new to course facilitation with planning and delivering customized applications of the National Retail Federation Foundation's (NRF Foundation) *Basic Customer Service & Sales Fundamentals* curriculum. It is designed to be used with both native and non-native English speakers and to prepare workers for the NRF Foundation credential exam.

While the NRF Foundation curriculum provides sufficient learning resources, this guide provides the information needed to customize the NRF Foundation's *Basic Customer Service & Sales Fundamentals Curriculum* to train incumbent⁴ workers based on the *specific* needs of a retail organization. This is a guideline for a 48 hour, 16 week course. While the textbook provides supplemental material and instructional guidance, the facilitator can make the curriculum his or her own by adding or editing content as needed. This includes the facilitator finding relevant videos, tailoring role plays, creating knowledge checks, etc. The content of the course can be adapted as appropriate based on specific requests from individual employers.

Instituto del Progreso Latino ("Instituto"), a nonprofit organization committed to the fullest development of Latino immigrants and their families through education, training, and employment, developed this guide based on Instituto's experience customizing the NRF Foundation curriculum for a grocery store retailer. It includes guidance on how to work with a retailer to incorporate their workplace practices, products, culture and values to make the NRF Foundation curriculum more relevant to a store, its managers' time and business constraints, and its workforce.

The guide begins with detailed planning information and some basic facilitation tips intended to help instructors who may or may not have a lot of teaching experience to deliver effective learning programs. This is followed by a step-by-step guide for customizing and teaching the curriculum, including:

- I. **Pre-Course:** Preparation activities for the retail store Project Team and Facilitator to ensure smooth delivery of the curriculum
- II. **During Class:** Week by Week customization recommendations for a 16 week / 3 hours per week curriculum
- III. **Post-Course activities** for the Project Team and Facilitator to debrief the course experience and outcomes and prepare for a student graduation ceremony

⁴ The definition of an "incumbent worker" referred to in this document is taken from the Illinois Worknet Center (www.illinoisworknet.com) as follows: "An Incumbent Worker is an individual (or group of individuals) with an employment relationship with a participating employer or group of employers in a targeted industry (as cited in the local plan); and an individual who is receiving upgraded skills training:

1. To increase his or her skills in an occupation in which the individual is already an incumbent; or
2. To prepare the worker for entry into a new occupation within the targeted workforce (i.e., the workforce of the participating employer or group of employers).

IV. **Supplemental Training Materials**, including a guide for administering the NRF Foundation practice and final credential exams, sample communications materials, and examples of class activities

Instituto is a core member of [Reimagine Retail Chicagoland](#), a collaborative group of more than a dozen workforce partners helping to improve the quality of jobs for workers in entry-level positions, creating pathways for advancement in retail and related sectors, and increasing retention for employers. This effort, part of the national Reimagine Retail initiative, is supported by the Aspen Institute Economic Opportunities Program with funding from the Walmart Foundation. Instituto is recognized by workforce service providers in the Chicago collaborative and across the country for its success developing win/win relationships with retailers that support economic mobility for frontline workers and business success.

This Facilitation Guide is focused on one of Instituto's Bridge programs, the NRF Foundation *Basic Customer Service & Sales Fundamentals* course. Instituto offers a Career Pathway in Retail to promote upward mobility within the retail sector. Our Retail Career Pathway includes courses such as ESL for Retail, Basic Customer Services & Sales Fundamentals, Advanced Customer Service, and Retail Management. Our curriculums are developed in-house by industry professionals and customized based on the needs of our specific audiences. Our Pathways are designed to allow students to progress from ESL for Retail to Retail Management.



Pre-Course Activities

This guide provides the information needed to customize the National Retail Federation Foundation's (NRF Foundation) *Basic Customer Service & Sales Fundamentals Curriculum* to train incumbent workers based on the specific needs of a retail organization. This is a guideline for a 48 hour, 16 week course. While the textbook provides supplemental material and instructional guidance, the facilitator can make the curriculum his or her own by adding or editing content as needed. This includes the facilitator finding relevant videos, tailoring role plays, creating knowledge checks, etc.

To ensure learning success, the facilitator and project team need to perform the following pre-course activities prior to the facilitator delivering the curriculum.

Step 1: Secure Required Materials / Guest Speakers

This curriculum is based on the NRF Foundation *Customer Services & Sales Fundamentals* textbook (Chapters 1-3), providing the material you need to deliver the curriculum. Complete the following first step:

- Order the Test of Adult Basic Education (TABE) Reading Comprehension test (Level D-9). You will use this to test incumbent employees and assess the reading level of each individual and determine whether their reading skills are adequate to support success in the course.
- Order the Trainer and Participant NRF Foundation Customer Services & Sales Fundamentals textbooks. Each student will need a textbook. They will need to complete exercises and quizzes, highlight or underline important points, and take notes in the margins of the textbook to prepare them for the exam. Textbooks can be purchased through [the Penn Foster website](#).⁵
- The Facilitator should review the Trainer Customer Services & Sales Fundamentals textbook, Chapters 1-3 (basic customer service). The Facilitator needs to become familiar with these chapters to prepare to take the NRF Foundation exam him/herself. The Facilitator should take the NRF Foundation exam prior to teaching to ensure he/she understands the content and is familiar with the test format.
- Provide or encourage students to bring pens and notebooks to take additional notes.
- Have computers (with Internet access) available for each student so they can take the NRF Foundation credential online exam (weeks 15 and 16).
- Have a projector/screen to show videos in class.
- Have a white board or flip charts/markers in the classroom.

Make arrangements for guest speakers from store management. Week 12: Merchandising (Buyer); Week 13: Loss Prevention Specialist; Week 14: Workplace Safety Specialist.

⁵ <https://pfdev8.mybigcommerce.com/textbook-old-customer-service-sales-advanced-customer-service-sales-textbook/>

Step 2: Prepare for the Certification Test

The facilitator should do the following to prepare for the NRF Foundation certification test:

- The facilitator should take the NRF Foundation Customer Services & Sales Fundamentals (Chapters 1-3) test.
- Either the facilitator or another person in the organization should take the proctor training to be able to administer the certification test.
- Register for the exam via the Penn Foster website. If you have existing *Customer Service & Sales* exam vouchers, NRF Foundation will transfer your existing exam vouchers to the new Penn Foster platform on 10/1 and extend their expiration window to 9/30/2020. To learn more about how to register on Penn Foster, visit the [FAQ page](#).⁶


NOTE: Test vouchers expire within one year of purchase.

Step 3: Determine Training Needs – Project Team and Facilitator

Each retailer has its own values, culture, workplace practices and procedures, and time and business constraints. The Project Team and Facilitator will need to meet with the Human Resources (HR) executive (or retail owner) to learn about their particular training needs and how they will work together to customize and deliver training.

- Obtain and review incumbent employees' job descriptions and responsibilities.
- Review competencies addressed in the NRF Foundation curriculum and discuss the store's priorities for worker learning and competency development.
- Meet with your retail business contact. This will likely be an HR leader, but could also be a store or district manager, or even a business owner if you are working with a small business. Determine the training needs that will result in the desired employee behavioral changes within the scope of the NRF Foundation curriculum.
- Discuss with the retailer how they will measure behavioral changes. Behavior changes can be measured by the Supervisor / Coach / Customer Observations / Customer Surveys, for example.
- Write down and then confirm verbally the desired employee behavioral changes with HR.
- Attend a new hire onboarding session to acquire information related to company practices, policies, terminology, statements of culture and values, etc.
- Decide when the trainings will be held to accommodate the business and workers' schedules. Determine if the participants will be paid during class time. Consider offering a percentage of each employee's hourly rate. Offering some form of compensation can make it easier for frontline workers to participate in and complete the program.

⁶ <https://nrffoundation.org/riseupfaqs>



See the [Aspen Institute profile](#)⁷ on partnership between the Instituto del Progreso Latino and Pete's Fresh Market for more information about how a training provider and retailer can customize a program for a particular business' culture and needs.

Step 4: Develop a Pre-Course Agenda

Prepare employees for the upcoming curriculum by offering a Pre-Course Information Session.

- Develop a Pre-Course agenda for a course information session for employees. See **Appendix A: Example Pre-Course Agenda**.

You will administer the Test of Adult Basic Education (TABE) Reading Comprehension test (Level D-9). See **Appendix A: Example Pre-Course Agenda**.

Step 5: Review Facilitation Tips

If you are not familiar with course facilitation, see **Appendix B: Facilitation Tips**. You will find information about:

- Facilitator roles and responsibilities
- Using training materials to enable learning
- Effective instructional techniques
- Addressing potential barriers to learning

Step 6: Deliver the Pre-Course Information Session to Employees

Prepare employees to take the course.

- Deliver the Pre-Course information session.
- Administer and grade the TABE Reading Comprehension test.
- Review the TABE test results.
- (In our experience, those who scored at a 5th grade reading level and above on the TABE test were prepared to be engaged, complete the course successfully, and pass the NRF Foundation exam.)

⁷ <https://www.aspeninstitute.org/publications/chicagos-fresh-approach-incumbent-worker-training/>

Step 7: Customize Curriculum

The *Customer Services & Sales Fundamentals* textbook provides the information and activities needed to prepare students for the NRF Foundation certification exam. It is assumed you will use the material most *relevant* to your students' needs and the particular retail environment they're working in. The purpose of this activity is to:

- Customize the existing NRF Foundation curriculum for your audience based on the identified training needs of your incumbent employees. This guide is designed for a 3 hours/week, 16 week curriculum, based on the time constraints of a retail grocer. It is a 48 hour program including a practice exam, exam registration, and the final NRF Foundation credential exam.

Following are some customization recommendations week by week (Week 1 through Week 13).





Curriculum Customization

Week 1

While the textbook contains valuable course content, you might consider the following recommendations for customizing Week 1, Course Introduction and Chapter 1, *Retail Industry Overview*, pages 7-12.

Pre-class preparation:

1. Create a syllabus that outlines the purpose of the course, anticipated course outcomes, the course format and structure, requirements for course completion, and the dates of the practice exam and final exam.
2. Prepare an ice breaker that facilitates student introductions, including current job titles. The activity should allow you to learn about students' job experience in retail and their language skills. See the NRF Foundation textbook (page 7) for an ice breaker example.

During class:

- Introduce the course by reviewing the course syllabus.
- Conduct the ice breaker activity.
- Have students read aloud the vocabulary in the textbook (pages 8-10). Ask them to relate the vocabulary (pages 8-10) to their own retail organization. Conduct a class discussion about their own experience with retail.

Assign the following homework:

Ask students to be prepared to discuss how they shop before the next class to determine the type of shopper they are.



Week 2

Recommendations for Week 2, Chapter 1, *Retail Industry Overview*, pages 13-20.

Pre-class preparation:

1. Create a Review Game or Knowledge Check (see **Appendix E: Knowledge Check Example**) to review vocabulary and concepts presented in the previous class.
2. Create a role play from the *No two customers are alike* section (page 14).

During class:

- Assess students' knowledge from the previous class using the Review Game or Knowledge Check.
- Conduct a class discussion on how students shopped the previous week and have them answer the question: *What type of shopper are you?*
- Relate the materials back to the organization where students work.
- Facilitate the *No two customers are alike* role play.

Assign the following homework:

Ask students to complete the Chapter 1 Quiz and to observe shoppers and evaluate what type of shoppers they might be.



Week 3

Recommendations for Week 3, Chapter 1, *Retail Industry Overview Review* and introduction to Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Create a role play for product features (page 32). Students should use products from the store where they work in the role play. Ask the store manager if you can use products from the store for the role play. You can return them to the store when you have finished the lesson for that day.

During class:

- Assess students' knowledge from the previous class using the Review Game or Knowledge Check.
- Review the Chapter 1 Quiz homework with the class.
- Create a class discussion for Chapter 2 vocabulary.
- Have students discuss product features and benefits (page 31) from the products of the store where they work.
- Take students to their store to view and discuss perishable and non-perishable items as a group Field Trip. See **Appendix D: Store Scavenger Hunt Example**.
- Conduct the product features role play.

Assign the following homework:

Ask students to walk up and down the aisles of the store where they work and learn the types of products and where they are displayed in each of the aisles.



Week 4

Recommendations for Week 4, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Copy weekly ads from two different stores. If your store has a weekly ad, then use it, and an ad from a competitor store.

During class:

- Assess students' knowledge from the previous class using the Review Game or Knowledge Check.
- Pair students and ask them to complete Exercise 4 (page 35) together using the weekly competitors' ads distributed by the facilitator.
- Have students remain in pairs and complete Exercise 4 (page 35) using the competitor ads on page 36.
- Have students remain in pairs and complete Exercise 5 (page 37) using the products appropriate to the store rather than the examples given in the book.
- Assign one role play to each pair to act out the appropriate responses (page 37).

Assign the following homework:

Have students review their own store ads and be prepared to answer questions about sale prices in their own store. If the store does not have ads, have them research the store items that are on sale. (We encourage students to become familiar with their weekly sales and any coupons.)



Week 5

Recommendations for Week 5, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a written knowledge check for Chapter 2 vocabulary (product features and benefits and competitor product comparisons). See **Appendix E: Knowledge Check Example**.
2. Create role plays for the various store departments emphasizing greeting the customer using verbal and non-verbal communication and ice breakers.

During class:

- Assess students' Chapter 2 vocabulary using the Knowledge Check.
- Use the store ad to review the homework assignment and verbally quiz students on the sale prices.
- Have students think about their own experiences with receiving and giving good and poor customer service and discuss with the class.
- Emphasize the importance of loyal customers and how students can influence customers by building trust.
- Pair students and ask them to complete Exercises 7, 8, and 9 (pages 43- 45) together.
- Assign the role plays you created and have students act them out in front of the class.
- Have students remain in pairs and complete Exercise 10 (page 46).

Assign the following homework:

Have students greet and acknowledge customers in their store.

Week 6

Recommendations for Week 6, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create the following Knowledge Check: write 25 open and closed-ended questions that are alternatives to the question "How can I help you?" to allow students to practice identifying open and closed-ended questions.
2. Create 10 closed-ended questions that students have to turn into open-ended questions. Use these questions for a role play that also incorporates greeting the customer, ice breaker, and open-ended questions.

During class:

- Have students take the open and closed-ended questions Knowledge Check.
- Have a discussion on the difference students have seen in their customers' behaviors when they greeted and acknowledged them.
- Have students read page 47 and then give students the handouts to complete (#2 in the Pre-class preparation).
- Pair students and have them complete Exercise 11 (page 48).
- Have students remain in pairs and complete the open-ended question role plays (#2 in the Pre-class preparation). See **Appendix I: Open-Ended Question Role Plays** example.

Assign the following homework:

Continue looking at store ads, greeting customers, and begin asking customers open-ended questions.

Week 7

Recommendations for Week 7, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a Knowledge Check with a customer scenario related to products in the store. In the knowledge check, ask students to write open-ended questions about a specific product to try to understand the customer's needs.
2. Find a short article that is relevant to the students. You will be reading this article to the students for the Active Listening exercise. Prepare questions to ask students about the article.

During class:

- Have students complete the Knowledge Check.
- Review the homework assignment.
- Have students complete Exercise 12 (page 49) and discuss as a class.
- Pair students and have them complete Exercise 13 (page 51). Have students identify questions in the scenario as open or closed.
- Have students read the scenario in Exercise 13 aloud.
- Conduct the Active Listening exercise that you created in the pre-class preparation. Ask students questions created in the pre-class preparation.
- Pair students and have them complete Exercise 14 (page 55).
- Have students find the open and closed-ended questions in the scenarios given on page 54.

Assign the following homework:

Continue greeting customers, asking customers open-ended questions, and practice active listening.



Week 8

Recommendations for Week 8, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Create role plays that include greeting the customer, asking open-ended questions, and what not to ask the customer (based on products sold in their store).
3. At the facilitator's discretion, find competitor stores and their phone numbers that students will use in an activity where they phone competitors to see how they were greeted and if they were given prices over the phone.

During class:

- Assess students' knowledge from the previous class using the Review Game or Knowledge Check.
- Review the homework assignment.
- Have students complete Exercise 15 (page 57). Assign students to read the Exercise 15 scenario aloud.
- Pair students and have them do the "what not to ask the customer" role play.
- Have students read page 59 and then complete competitor store phone calls activity.
- Assign students to read Exercise 17 and discuss answers to the questions as a class. Discuss if personal and practical needs were met in the Exercise scenario.
- Ask students to provide some angry customer scenarios they might have encountered. You will use these scenarios to create role plays for the next class.

Assign the following homework:

Have students read pages 63-68 and continue greeting customers and using open-ended questions.



Week 9

Recommendations for Week 9, Chapter 2, *Customer Service*.

Pre-class preparation:

Create role plays for angry customer scenarios, using the scenarios students provided in the previous class. Learn about the store's grievance process and how it relates to the textbook's Four-Step Grievance Process (page 73).

During class:

- Begin with the Mid-Unit Knowledge Check (page 69). Review answers with the class.
- Read pages 69-71. Assign students roles in Exercise 20 and have them read Exercise 20 aloud. Then read pages 73-74 to debrief the Exercise 20 dialogue. **NOTE:** There is a mistake on page 72. These questions do not relate to the dialogue. Do not have students complete it.
- Conduct the "angry customer" role plays incorporating the store's grievance procedures.
- Conduct class discussion using "Use Customer Feedback to Improve Satisfaction" (page 74). If the store has in its website a section that solicits customer feedback, navigate to the store website to show students the customer feedback section.

Assign the following homework:

Have students continue greeting customers and using open-ended questions.



Week 10

Recommendations for Week 10, Chapter 2, *Customer Service*.

Pre-class preparation:

1. Create a Knowledge Check asking for the steps of the Four-Step Grievance Process and the grievance process used by their store.
2. Find products from the store that students can use for product demonstrations and cross-selling / upselling.
3. Find a video that shows a demonstration of one of the products that their store carries. (You can find videos through any search engine and YouTube.)

During class:

- Have students complete the Knowledge Check.
- Ask students to complete Exercise 21 (page 76) using products that are relevant to their store.
- Read points 1-4 on page 77. Then show the product demonstration video you identified. Conduct class discussion about the video.
- Read pages 77-79.
- Pair students and ask them to role play Exercise 22 using products from their store.
- Read page 83 on cross-selling and upselling. Role play cross-selling and upselling using products from their store.
- Have students do Exercise 23 as a class.

Assign the following homework:

1. Read warranties (pages 87-89).
2. Have students start cross-selling and upselling products in their own store.



Week 11

Recommendations for Week 11, Chapter 2, *Customer Service* and Chapter 3, *Store Operations*.

Pre-class preparation:

Create a Knowledge Check that prompts students to discuss cross-sell and upsell opportunities using the products from their store.

During class:

- Have students complete the Knowledge Check.
- Complete Exercise 24 (page 91) and Exercise 25 (page 92) in pairs.
- Complete the Chapter 2 Quiz (page 95) on their own.
- Start Chapter 3. Read Store Operations (pages 99 and 100). Review the Distribution Channel (Chapter 1) and relate the supply chain to their own store.
- Complete Exercise 1 in pairs (page 101).
- Read pages 102-108 and complete Exercise 2, 3, and 4 in pairs.

Assign the following homework:

Have students continue greeting customers, using open-ended questions, and cross-selling and upselling products in their own store.



Week 12

Recommendations for Week 12, Chapter 3, *Store Operations*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Confirm that the Merchandising (Buyer) guest speaker will be presenting (30 minutes) during this session.
3. Create a Store Activity Sheet that contains specific areas of the store you want to students to focus on and record their observations. See **Appendix F: Store Activity Sheet Example**.

During class:

- Have students complete the Knowledge Check.
- Have students read the Merchandising chapter (pages 109-113) and complete the Exercises.
- Take students to their store to view and discuss the merchandising as a group Field Trip.
- Introduce the Merchandising (Buyer) guest speaker. Allow students time to ask questions.
- Have students complete the Chapter 3 Mid-Unit Knowledge Check (page 122).

Assign the following homework:

Have students complete the Store Activity Sheet at a store of their choice.

Week 13

Recommendations for Week 13, Chapter 3, *Store Operations*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Confirm that the Loss Prevention Specialist guest speaker will be presenting (30 minutes) during this session.
3. **Reminder:**
 - Reserve computers for students. Ensure there is an Internet connection.
 - Make sure test vouchers for each student from Penn Foster have been ordered.

During class:

- Conduct a class discussion about students' store visits.
- Read Loss Prevention (pages 123-125) and conduct a class discussion about students' own experiences with loss.
- Put students in groups of 3-4 people. Have them role play Exercise 12 (page 126) using products from their store.
- Read pages 127-133 and complete the exercises.
- Introduce the Merchandising (Buyer) guest speaker. Allow students time to ask questions.

Assign the following homework:

Be aware of shoplifting red flags as noted in the NRF Foundation textbook (pages 124-125). Be prepared to discuss with the class your observations.

Week 14

Recommendations for Week 14, Chapter 3, *Store Operations*.

Pre-class preparation:

1. Create a Review Game or Knowledge Check to review vocabulary and concepts presented in the previous class.
2. Confirm that the Workplace Safety Specialist guest speaker will be presenting (30 minutes) during this session.
3. Secure and print the store's version of the *Incident Investigation* form and the *Employee's Report of Injury* form.
4. Create a role play for Exercise 19, using the products from your store.
5. Secure an empty medium-size box for the proper lifting techniques role play.
6. Create a flyer with the exam information (exam date, time, and location). See **Appendix G: Exam Information Flyer Example**.
7. Reminder: Make sure the test vouchers were ordered from Penn Foster.

During class:

- Have students complete the Knowledge Check.
- Read Workplace Safety (pages 135-142). Complete the exercises.
- Hand out the store's *Incident Investigation* form and the *Employee's Report of Injury* form to use during the role play (Exercise 19, pages 142-143).
- Read Proper Lifting Techniques (pages 143-144). Have students demonstrate proper lifting techniques using the empty box.
- Have students take the Chapter 3 Quiz (pages 144-145).
- Introduce the Workplace Safety Specialist guest speaker. Allow students time to ask questions.
- Distribute a flyer with exam information (exam date, time, and location).

Assign the following homework:

1. Have students study textbook Chapters 1-3 in preparation for the final exam. Encourage students to review vocabulary words (pages 267-269) and the exercises in Chapters 1-3.
2. Ask students to bring the NRF Foundation registration form to the next class. See **Appendix H: National Retail Federation Foundation – Exam Registration**.

Week 15

Pre-class preparation:

1. Create a paper-based practice exam (25 questions) based on textbook Chapters 1-3.
2. Ensure computers and Internet are working.
3. Review the test taking tips provided in **Appendix B: Facilitation Tips**.
4. Reminder: Make sure the test vouchers were ordered from Penn Foster.

During Class:

- Assist students with the registration for the final **Credential** Exam. Each student must have his/her own computer. Each student must write down their username and password in a secure place.
- **Note:** You can make a copy of each student's username and password as this is essential for taking the exam. See **Appendix H: National Retail Federation Foundation – Exam Registration**.
- Allow 30-45 minutes for this activity.
- Provide the test taking tips to students. See **Appendix B: Facilitation Tips**.
- **Note:** The designated proctor administers the National Retail Federation Foundation's *Basic Customer Service & Sales Fundamentals* online **Practice Exam**. Have students take the NRF Foundation Customer Services & Sales Sample Test (15 questions).
- Distribute the paper-based exam to those who finish the online exam while other students are still taking the exam.
- When students complete paper-based and online exams, review the answers to the paper-based and online exams.
- Ask students to write and turn in 1-3 sentences about what they learned from the class that helped them on-the-job.

Assign the following homework:

Have students study textbook Chapters 1-3 in preparation for the final exam. Encourage students to review vocabulary words (pages 267-269) and the exercises in Chapters 1-3.

Week 16

Pre-class preparation:

1. Ensure computers and Internet are working.
2. Have pencils and scratch paper for each student.
3. Have copies of students' exam username and passwords.

During class:

- The designated proctor administers the National Retail Federation Foundation's *Basic Customer Service & Sales Fundamentals* **Credential Exam**.
- Students complete the exam.
- When students complete the exam, they will know whether or not they passed immediately.
- We encourage the facilitator to meet on an individual basis with those students who did not pass the exam and provide them with extra tutoring and a make-up exam date.

Print off the final exam results for each student and make two copies; one for the student and one for your records.

Week 17

- For those who did not pass the final credential exam the first time, offer tutoring to them prior to their re-taking the exam.
- Students who wish to make-up or re-take exam can do so this week.
- Follow Week 16 steps.



Post-Class Activities

Curriculum Debrief & Wrap-up

Host a post-class debrief meeting with store management, including:

A Curriculum Debrief, including:

- What went well during the course and what needs improvement.
- A review of students' feedback sheets (1-3 sentences containing what they learned from the class that helped them on-the-job).
- The organization's observations of workers' improvement on-the-job.
- A summary of curriculum statistics such as:
 - Number of students who completed the course
 - Number of students who passed the Credential exam
 - Number of students who dropped out of the course / the reasons for dropping the course and how to re-engage the drop-outs

Future Planning:

- Discuss advancing students who passed the Basic Customer Services & Sales final credential exam by offering the Advanced Customer Services & Sales course to them.
- Plan the graduation ceremony, including guest speakers, food, printing of the Certificates of Course Completion and NRF Foundation Credential Certificates, and graduation invitations for students, their families, facilitator, and project team. Ensure the ceremony is celebratory and acknowledges the achievements of the students.
- We recommend continuing the conversation with the employer about future trainings and setting up schedules according to their future needs.
- If needed, consider revising the initial contract with the employer so that both you and the employer agree on the expectations and deliverables.



Appendix: Table of Contents

Following are the supplementary materials and the places where they are referenced.

Appendix Materials	Location Where Referenced
Appendix A: Example Pre-Course Agenda	Pre-Course Activities Step 4: Develop a Pre-Class Agenda
Appendix B: Facilitation Tips	Pre-Course Activities Step 5: Review Facilitation Tips
Appendix C: Educational Video Example	Appendix B: Facilitation Tips
Appendix D: Store Scavenger Hunt Example	Curriculum Customization: Week 3
Appendix E: Knowledge Check Example	Curriculum Customization: Week 5
Appendix F: Store Activity Sheet Example	Curriculum Customization: Week 12
Appendix G: Exam Information Flyer Example	Curriculum Customization: Week 14
Appendix H: National Retail Federation Foundation – Exam Registration	Curriculum Customization: Week 15
Appendix I: Open-Ended Question Role Plays	Curriculum Customization: Week 6



Appendix A: Example Pre-Course Agenda

1



Insert your store logo here

Workforce Development Training Initiative
Appendix A: Pre-Course Agenda

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2

Your store's name and Instituto Partnership

- ▶ This is a workforce initiative between *your store's name* and Instituto
- ▶ Provide *your store's name* employees with staff development and training opportunities
- ▶ Prepare *your store's name* employees for opportunities to grow within their organization

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Our mission is to contribute to the fullest development of Latino immigrants and their families through education, training, and employment that fosters full participation in the changing US society while preserving cultural identity and dignity.

3

- ▶ *Established in 1977*
- ▶ *Leader in Workforce Development through career pathways*
- ▶ *Career Pathways*
 - *Carreras en Salud*
 - *Manufacturing Technology Program*
 - *Retail Academy*
- ▶ *Adult Basic Education*
- ▶ *Citizenship*
- ▶ *Youth Development*
- ▶ *Instituto Health and Science Career Academy (IHSCA)*
- ▶ *Instituto Justice & Leadership Academy (IJLA)*
- ▶ *Financial Opportunity Center (FOC)*

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Purpose of this Training

4

- *Enhance your Customer Service Skills*
- *Enrich your Managerial Abilities*
- *Gain a Certificate of Completion from Instituto*
- *Earn a Nationally recognized Retail Credential from the National Retail Federation*
- *Advance your English and Retail vocabulary*
- *Know the digital skills needed to take the online exam*
- *Receive Training to increase chances of growing within your store*

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Retail Customer Service Training

5

Where: TBD

When: TBD

How long? 3 Hour Lessons / one time per week

How many weeks? 16 weeks

Homework? Reading and Real-Life practice at work



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Earn a Professional Credential from the National Retail Federation

6

Basic Customer Service and Sales Professional Credential



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Basic Customer Service and Sales Credential

7



- ▶ Product features, benefits, and services
- ▶ Assessing and meeting customer needs
- ▶ Preparing for selling, gaining customer commitment & closing the sale
- ▶ The basics of store operations and inventory control
- ▶ The basics of merchandising
- ▶ The importance of communication and team work

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TABE Test (Test of Adult Basic Education)

8

What is the TABE test? Why do I need to take it?

- ▶ **The Test of Adult Basic Education (TABE) Test is required for ALL of the students at Instituto**
- ▶ **No pass or fail**
- ▶ **It helps teachers assess your needs and preparation to succeed in the course**
- ▶ **You will take it now 😊**

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Questions?

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Appendix B: Facilitation Tips

Relates to the Pre-Course Activities Step 5: Review Facilitation Tips

Whether or not you are familiar with course facilitation, the course **Facilitation Tips** will prepare you to facilitate the National Retail Federation Foundation Customer Services & Sales Fundamentals course. The **Facilitation Tips** will enable you to:

1. Describe the *support services* roles and responsibilities of a facilitator
2. Describe the *instructional* roles and responsibilities of a facilitator
3. Use the training materials to enable learning
4. Demonstrate effective instructional techniques
5. Address potential barriers to learning

Facilitator Support Services Roles and Responsibilities

Complete the following to ensure your students are on track and getting any additional services they might need:

1. Create a class attendance sheet with space for the class date, student names, and spaces for student and instructor signatures. These sheets are shared with the retailer and the support services person responsible for paying students for their training time, if applicable. Attendance sheets also track weekly student course completion. Students should have no more than three absences during the course. *If they miss more than three classes, they are not eligible for the final exam.*
2. Schedule regular check points with the retailer and support services to communicate course progress, discuss any concerns, and solicit feedback about any changes in worker performance

Refer students to community support services for tutoring in reading, ESL, child care, transportation, or other resources they might need to help them successfully complete the course.



Facilitator Instructional Roles and Responsibilities

It is the responsibility of the facilitator to guide incumbent workers to learn the knowledge and skills necessary to pass the NRF Foundation exam. You serve as the content expert, an excellent communicator, and a student supporter. The facilitator should:

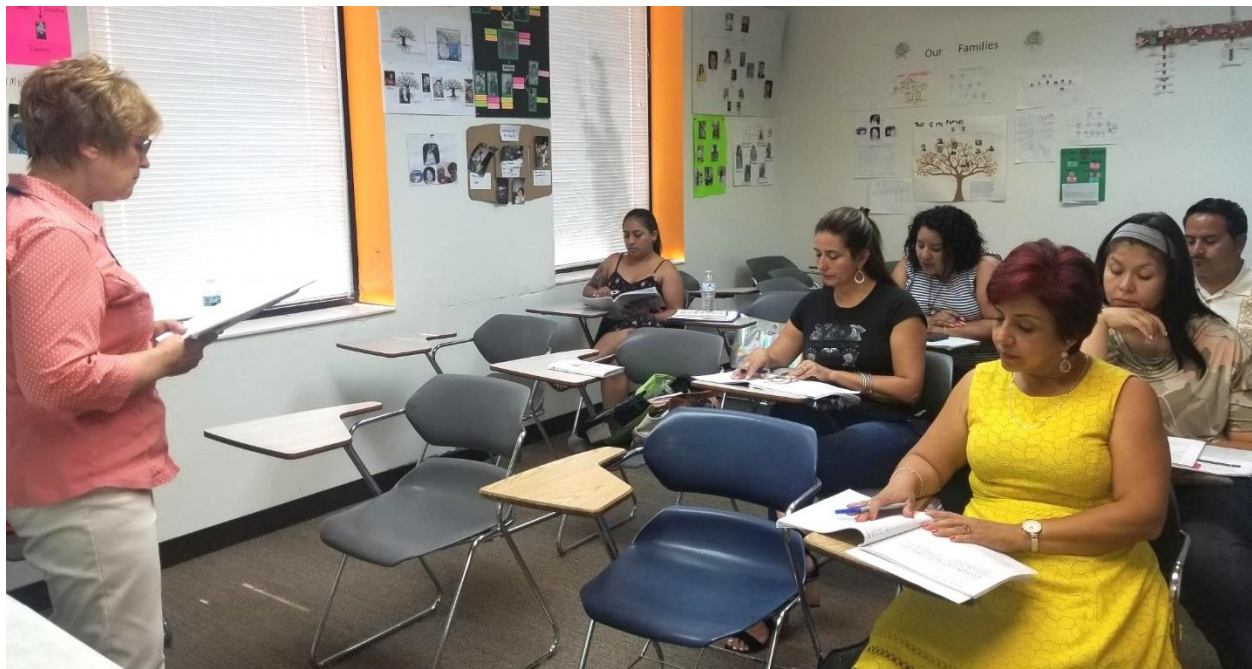
1. Allow yourself *at least one hour of class preparation* time for every 3 hours of classroom instruction.
2. Have the knowledge and experience to help tie concepts to workplace practice.
3. Know as much as you can about how the knowledge or skills developed in the course fit into the workplace.
4. Present new information to learners in a logical, sequential order so that it is easier for learners to store and retrieve that information.
5. Vary your teaching methods (lecture, media, role plays, scavenger hunts, store field trips, discussion, and knowledge checks). This guide provides specific examples of diverse activities you can use to keep learners engaged.
6. Use questions to gain insight into what the learner understands and what they don't. Have students share their experiences with retail. Life experience is a valuable learning tool for adults.
7. Collect and use information from a variety of media (videos, relevant articles, store sales flyers, etc.).
8. Be able to present material verbally in a clear and understandable manner.
9. Be able to give *and receive* verbal and non-verbal feedback.
10. We encourage giving students a 10 minute break during the 3 hour class.

How to Use the Training Materials: Customer Services & Sales Fundamentals textbook

The National Retail Federation Foundation **Trainer Customer Services & Sales Fundamentals** textbook provides the content and activities you need to deliver the course effectively. You must allow **at least one hour** of preparation time for every 3 hours of instruction.

Review the **Trainer Customer Services & Sales Fundamentals** textbook, Chapters 1-3 (basic customer service). Throughout the textbook, supplemental activities are recommended. You can choose the supplemental activities from the textbook that suit the needs of your audience.

The recommendations provided in the weekly curriculum customization sections in this guide are based on the course delivery for a particular retail grocery chain. *The customizations are suggestions only.* They can be used depending on the needs of your particular audience.



Christine Feldmann facilitates a Customer Serve and Sales class to small business owners.

Additional Supplemental Training Materials / Guest Speakers

Review Games

You might want to consider using games and knowledge checks to review vocabulary and textbook concepts. Review games might include:

- Retail Feud (based on the Family Feud game). Buzzers can be purchased online.
- Jeopardy (Template can be found through any search engine.)
- Who Wants to be a Millionaire (Template can be found through any search engine.)

Expert Guest Speakers

Guest speakers from your store for merchandising, loss prevention, and workplace safety can help illustrate textbook concepts, engage students, and help them connect the concepts to their store and work. Secure guest speakers as a pre-course activity to ensure that you can schedule store specialists when you need them.

Training Materials Checklist

Secure training materials, supplies, and classroom equipment in advance. Following is a **Training Materials / Supplies / Equipment Checklist**.

- National Retail Federation Foundation Trainer Customer Services & Sales Fundamentals textbook for the facilitator
- National Retail Federation Foundation Participant Customer Services & Sales Fundamentals textbook – one per student
- Test of Adult Basic Education (TABE) Reading Comprehension test (Level D-9) – one per student
- Customer Service & Sales Certification exam test vouchers – one per student (plus a recommended additional 10% for those who might re-take the exam)
- Pens and notebooks for students
- Projector and screen to show videos in class
- White board or flip charts and markers
- Schedule and confirm the following guest speakers for Weeks 12 and 13: Merchandising (Buyer) and Loss Prevention Specialist in Week 14 you need a Workplace Safety Specialist from the store.
- Computers (with Internet access) for each student so they can take the NRF Foundation credential online exam (weeks 15 and 16)

Demonstrate Effective Instructional Techniques

Adults learn best when they can see practical applications of new information to their job responsibilities. They need to be engaged in the learning process and the knowledge and experience they have already gained should be recognized. Following are some basic instructional techniques that will facilitate learning.

Contextualize for Your Store

Modify the exercise language in the textbook to reflect the products and services your store provides. Students will retain the information better if the exercises are put in the context of their store operations. *For example*, if a particular customer service exercise in the textbook refers to a Sports Department, and your store does not have a Sports Department, then change the department in the exercise to one that your store has and change any questions or activities to pertain to that department. *For example*, if your store has a Produce Department, you might change an exercise about displaying basketballs to be about displaying vegetables.

Teaching Methods Flow

The following teaching methods flow enables students to review previously learned material, learn new concepts, and practice what they have learned.

1. **Review!** Review vocabulary and concepts previously learned before moving on to new material. Use knowledge checks and review games.
2. **Tell me!** This is the lecture, the portion of the class where you present new concepts and show how the facilitator's own personal experiences relate to the content. Then you allow students to ask questions before moving on.
3. **Show me!** At this point you make concepts come alive. You can demonstrate a concept yourself or show a relevant video. *For example*, if you want to illustrate the concept of "active listening" you can demonstrate active listening and/or you can find a video demonstrating active listening. **Note:** MindTools.com and YouTube have short videos that demonstrate various concepts covered in the textbook. Also, see the **Appendix C: Educational Video Example**.
4. **Let me!** Here you have students practice the concepts learned through role plays, scavenger hunts, discussions, paper-based exercises, or other activities that allow them to practice what they learned. Examples are provided throughout this guide and in the appendix.
5. **Help me!** Finally, you offer support for students by giving them meaningful feedback on their role plays, exercises, and discussions. Ask them to relate the concepts back to their jobs. Have students discuss their on-the-job application with the class. Answer questions before you move to the next topic.

Conducting Role Plays

When pairing students for role plays, have every pair practice and then present their role play to the class. Ask students to give each other feedback. *For example*, if the role play includes the store's grievance process, have the class evaluate if all steps in the grievance process were used. Ask what went well with the role play and what could have been improved.

Role Play Facilitation Tips

- Allow 30 minutes for the role play. Every student role plays.
- Divide students in groups of 3-4 students.
- Give students the role play to act out.
- Have students determine their titles in the role play and come up with a plan for the interaction.
- Each student must have a speaking role.
- Have students practice the role play prior to performing in class.
- Each group performs in the role play.
- Ask the rest of the class what was done well and what could have been done better after each role play. Did they address the concepts in the given role play topic?



Three Instituto students who just finished taking their NRF Foundation exam online.



Demonstrate Effective Learner Assessment Techniques

Your class might include students with a wide range of language skills and retail work experience. Following are some tips that will help you assess your students' skills and abilities to help you pace your class and know when to introduce supplemental materials to support your students' specific needs.

Vocabulary Review

At the beginning of the class, review vocabulary used in the textbook from the previous class. You can use review games or create paper-based vocabulary knowledge checks similar to the knowledge check included in **Appendix E: Knowledge Check Example**.

Literacy Awareness

While the TABE scores are a good indicator of reading comprehension, you will have to be conscious of students' educational backgrounds and English language literacy. You will pace your class based on the literacy level of the class.

Digital Awareness

Students' computer skills may vary. Students will need to have basic computer skills (logging into the Credential Exam site, using the mouse and online calculator). You can review and address these skills during the Practice Exam.

Address Potential Learning Barriers

Communicate

Ask for feedback.

While your initial training needs assessment with HR executives has given you direction, you need to communicate throughout the training with HR to address any additional needs that perhaps had not been identified prior to the class.

Ask for feedback from your students during the training to make sure you are meeting the educational needs related to their jobs.

Evaluate

Know your audience's language skills.

Your students may have varying levels of English comprehension. It is important to review new vocabulary for all levels of English speakers and critical to spend time explaining any vocabulary (whether in the NRF Foundation textbook or arising in class discussion) that presents difficulty for English as a Second Language (ESL) learners. Do a vocabulary review at the beginning of the class. Encourage students to bring dictionaries – or use dictionaries and translators on their phones.

Provide test taking tips

Prepare your students for the NRF Foundation Credential Exam.

Whether or not students have taken exams in the past, here are some ways you can help them prepare to take the online NRF Foundation Customer Service & Sales Certification exam.

1. **Emphasize** that students need to read and study the textbook on their own. They need to complete the homework assignments. You will review lessons and homework with them as part of exam preparation.
2. **Advise** students that the exam will be taken online in English only. It includes:
 - a. Questions with multiple choice answers.
 - b. An online calculator for a portion of the exam. Pencil and paper will also be provided for math calculations.
 - c. They will have the ability to “flag” (or mark) questions they would like to return to later in the exam if they are uncertain about the answer.
 - d. There is a timer on the computer that shows how much time remains in the test period.
 - e. They will have the chance to practice taking the online exam with the practice test.
 - f. There are 75 questions in the credential exam. Students have 1.5 hours (2 hours, 15 minutes for ESL students) to complete the exam. See the **National Retail Federation Foundation – Exam Registration in the Appendix**. You will give this document to students and review it with them prior to the practice exam.
3. **Provide** test taking tips:
 - a. Relax! Answer the questions first that you are certain you know the answers to. Flag the questions where you have some doubt, and then return to answer them to the best of your knowledge.
 - b. Read the entire question and all answer options carefully before you choose your answer. Sometimes *one word* in a question or answer will need to be carefully contemplated before you answer the question.
 - c. Eliminate answers you know are wrong and focus your time on the remaining options.
 - d. Do not watch the timer on the computer. Simply use it as a reference to see how much time is remaining.



Appendix C: Educational Video Example

The *Supermarket Psychology: Supermarket Layout* YouTube video⁸ is a short clip that helps retail grocery students learn about supermarket psychology. It is a great video for discussion. You might need to show the video a couple of times since the presenters' accents are Australian and sometimes it's difficult for students to understand. Consider having students complete the following questionnaire after watching the video.

Note: It is helpful to review the questions before you start the video so students know what to listen for.

1. What does "trolley" mean as referred to in this video?
2. What are the 3 items the man in the video must find in the store?
3. How much time does he have to find the items?
4. Which direction do people usually shop in at grocery stores?
5. How much more money do customers spend when they shop in an anti-clockwise direction?



RE|IMAGINE
Retail Chicagoland



⁸ *Supermarket Psychology: Supermarket Layout* YouTube video, Published on July 14, 2009: In this excerpt from SBS series, Food Investigators, Renee Lim, Paul Harrison from Deakin University, and Joe Avati discuss the psychology behind supermarket layout. <https://www.youtube.com/watch?v=g3lwOgA3Ngw>

Appendix D: Store Scavenger Hunt Example

Following are example questions you might consider when taking a field trip to in a grocery store. Ask questions similar to the following as you walk around the store with your students. You can tailor a scavenger hunt to the store of your choice. Alternatively, you can have students go on a scavenger hunt individually and then conduct a discussion when they return to the classroom.

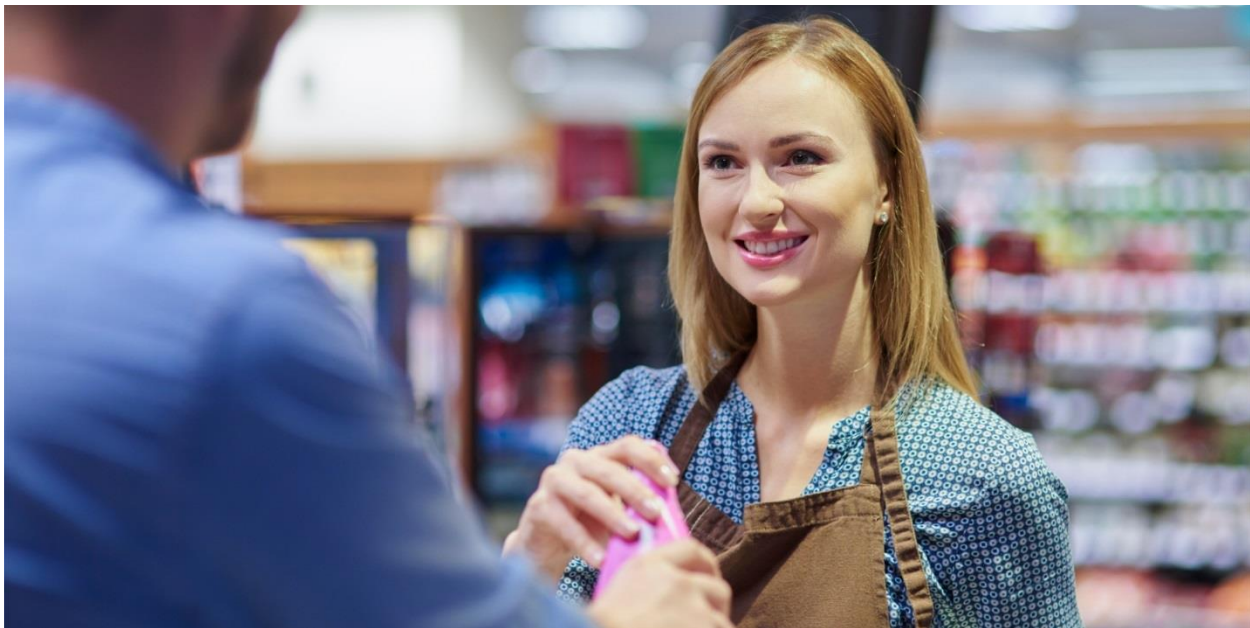
Field Trip Questions at a grocery store:

1. Where are the perishable items usually located?
2. Where are the non-perishable items usually located?
3. Are bananas perishable or non-perishable?
4. Is steak perishable or non-perishable?
5. Where are sugary cereals placed?
6. Why do you think sugary cereals are placed on certain shelves?



Appendix E: Knowledge Check Example

1. Within how **many seconds** should you greet your customer?
2. What are some ways you can greet a customer **without using words**?
3. Please define **revenue**.
4. Studies show that **customers who are greeted promptly** _____. Please complete the sentence.
5. What does **employee retention** mean? Is it something your store wants?
6. Please define **employee turnover**. Is it something your store wants?
7. Loyal customers are the most profitable customers. **True or False?**
8. How much does the average customer **spend per year buying groceries**?
9. Please define a **diverse shopper**. Is it something your store wants for their customers?
10. Please indicate how you greeted your customers this week. Verbally or non-verbally? What did you say? Did you notice a difference in how the customers reacted?



Appendix F: Store Activity Sheet Example

Instructions: Complete this sheet **after** you observe different parts of the store of your choice. Please **do not take any photos**.

Name of Store Visited: _____

Type of Store: _____

1. Did anyone greet you when you walked in? Smile, nod, or acknowledge you?
2. Did anyone ask if you needed help? Did they use open or close-ended questions?
3. Did anyone go above and beyond to help you? How did the store associates make you feel?
4. Does the store have the items you want in stock?
5. What kinds of merchandise does this store have?
6. How is the store organized? By merchandise?
7. Is the store clean? Are there any safety hazards?
8. Does the store have its own brand? If so, what is the name?
9. Does the store play music?
10. Does the store have a smell? Good or bad?
11. How do the prices compare to the stores you usually shop?
12. Would you recommend this store to friends and family?
13. Would you go back to this store based on your overall customer experience?



Appendix G: Customer Service & Sales Certification Exam Example

Practice Exam & Registration

Location	Time	Date	Bring
Insert Address Exam Room Name	1:00 – 4:00 PM (Arrive before 1:00 PM to look for parking – space is limited.)	Wednesday, June 13 th , 2018	Photo ID E-Mail and Password Information

Customer Service & Sales Certification Final Exam

Location	Time	Date	Bring
Insert Address Exam Room Name	1:00 – 4:00 PM (arrive before 1:00 PM to look for parking – space is limited)	Wednesday June 20 th , 2018	Photo ID E-Mail and Password Information

** The practice exam is mandatory if you would like to take final exam **



Insert Your Store
Logo Here.

Appendix H: National Retail Federation Foundation – Exam Registration

Steps to Pre-Register

See the Penn Foster Quick Start Guide here:

<https://nrf.app.box.com/s/xdi8ksljbed3d10s63crqlwpblfwc6gu>.

- Log-In as a Learner
- Fill out everything (make sure to include suffix, i.e. Mr. Mrs. or Ms.)
- Write down user name and password (please do not lose this paper)
 - a. Username _____
 - b. Password _____
 - c. Please do not lose this, you will need this for the exam
- Then you will need to access your e-mail to confirm your Rise-up account
 - You will need to sign into your e-mail
 - You must know your e-mail username and password
 - Confirm your Penn Foster account with your e-mail
- Once you have confirmed your Rise Up account with your e-mail, Log In to Rise using your username and password above
- Once logged in, click on the Home tab
Scroll down and Select the Partner – Choose Instituto del Progreso Latino as the Partner
- Then scroll down a little bit more and click on START REGISTRATION (bottom left)
- Follow Steps with Information on back of this paper to START REGISTRATION for the specific exam

