BOOKSTORE CASE STUDY

ALVA CONSULTING INC.
BRIGHT IDEAS IN TECHNICAL & BUSINESS COMMUNICATIONS

BACKGROUND

Note: Upon request, the bookstore name used in this case study and corresponding samples was changed to Alva Store (fictitious name).

The volunteers who work at Alva Store (a bookstore) need to quickly and effectively perform tasks as customer service representatives when they work their scheduled shifts at the bookstore. The volunteers work at the bookstore three times a month. The existing reference manuals and materials are disorganized and not current. In addition, the bookstore inventory, promotions and various bookstore information changes frequently between the times a volunteer may work at the bookstore. Information about changes in inventory, promotions and other pertinent information must be communicated in a timely manner when the volunteer is working at the bookstore. Weekly tasks performed by volunteers may include:

- Point of Sale (POS) transactions using the registers/computers (Transactions for items such as: books, media, greeting cards, wall art, tickets, candy/pop, jewelry, clothing, etc.).
- Special orders and searches for items using the registers/computers.
- Explaining the functionality of items sold at the bookstore.
- Helping customers find items in the bookstore.

AUDIENCE DEMOGRAPHICS

Information gathered about the target audience:

- A total combination of adult women (36) and men (6) over thirty-five years old.
- Most adults obtained a post-secondary education.
- Various reasons/motivations for volunteering at the bookstore.
- Prior knowledge of retail sales and POS registers/computers.

SOLUTION

I created a blended learning approach as the solution based on the data gathered from the needs and tasks analysis. The blended learning approach included quick reference guides, job aids, weekly demonstrated quick tips and role playing at the quarterly volunteer meetings. This approach allowed the volunteers to learn on-the-job, in addition to interacting with their peers via role playing at quarterly meetings.

LEARNING OBJECTIVE

When applicable, the volunteer will be able to locate and apply the task-appropriate job aid information to successfully help a customer in a timely manner. The volunteers will be able to perform important customer service tasks with minimal errors when they work at the bookstore.

(Supporting data collection information available upon request.)

ALVA Store

QUICK REFERENCE GUIDE

Policies and Procedures

ALVA Store

Alva Store Policies

- Emergency Contacts
- Schedules
- Prospective Volunteers
- Discounts
- Holds
- Returns
- And more…

NOTE: The information in this section is intended as a quick reference for some of the policies implemented at the Alva Store.

Updated: 2016 (The information in this section is updated as needed.)

(Note: This is a sample list of some policies and procedures at the Alva Store.)

Emergency Contacts

Below is a list of emergency contacts when Alva Store staff is not available.

Attention Supervisors: If Alva Store staff is not available and you have any issues, contact these people:

Issue	Name	Phone Number
Problems with computers/registers and any power outages	Joe Smith	123-456-7890
Security	Jill Jones	123-456-7891

Arrival Times

It is the Alva Store policy to be open thirty (30) minutes before and after each scheduled event. Please try to arrive at the scheduled times below. This allows some time to read and discuss the weekly instructions before working.

	Thursday	Friday	Saturday
Supervisors	5:00 p.m.	4:00 p.m.	9:00 a.m.
Volunteers	5:15 p.m.	4:15 p.m.	9:15 a.m.

Signing in for your shift

Be sure to sign in to each tracking system:

- Computer sign in application – Use the tracking application on the first computer by clicking the login logo that looks like a timesheet. Enter your name and number.
- Blue sign in form on the back counter – Sign in and specify the date and time you worked at the Alva Store. The manager uses the blue sign in forms to determine who worked their scheduled shift each week. (The information on this form is used to track and offer the special 25% discount appropriately.)

Schedules

It is a requirement that each volunteer work three shifts each month. Volunteer schedules are created for two-month timeframes.

January/February	March/April	May/June
July/August	September/October	November/December

Schedule Requests (Indicate dates you are unable to volunteer)

Any schedule requests for dates you are not able to volunteer must be submitted to the Alva Store manager by the manager's requested timeframe. If something comes up and you are unable to volunteer for a time you are scheduled, contact the manager and/or supervisor for that shift and PLEASE try to get a substitute.

Prospective Alva Store Volunteers

There is always a need for volunteers to work at the Alva Store.

If someone is interested in finding out more about volunteering at the Alva Store:

1. Give the person both the Volunteer Responsibility Requirements document and a Volunteer Application form located in the top drawer of the file cabinet.
2. Write the person's name and phone number on the Prospective Volunteer form. Include the date they came in and expressed interest. This helps the manager keep track of people who are interested in volunteering at the Alva Store.

Important: Never give out the last application in the folder. If running low, please make copies.

If someone is dropping off a completed Volunteer Application form:

1. Thank the person and tell them the manager will follow up with them in three days.
2. Put the completed application on the manager's desk.

Discounts

Discounts are offered to volunteers.

Everyday Discounts

- 25% off media
- 20% off books
- 15% off all other items (For example: gifts, wall art, music CDs, cards, etc.)

Note: Discounts are NOT applicable to sale or clearance items.

Special Alva Store Volunteer Discount

The special offer of a 25% discount on a total purchase is based on the fulfillment of the volunteer requirements at the Alva Store. To receive the special discount, an Alva Store volunteer had to work three times per month in a consecutive two-month timeframe. (For example: A volunteer that worked three times in January and three times in February would receive the opportunity to use a 25% discount off a one-time total purchase in March or April.)

Important: Supervisors must write the date and amount of the Alva Store volunteer discount purchase on the Alva Store Volunteer Special Discount form.

Returns

Each Alva Store sales receipt states: "A RECEIPT DATED WITHIN 30 DAYS IS REQUIRED FOR ALL RETURNS/EXCHANGES. OPEN/DEFECTIVE MEDIA EVEN EXCHANGE ONLY."

Filling out a Refunds/Exchanges form:

1. Write the customer's name.
2. Write the customer's phone number.
3. Write a brief description of the item(s).
4. Write the reason for the return.
5. Check the appropriate description for how you handled the return.
   - **Cash** – Check this option if the customer has a receipt and ONLY if the receipt shows payment in cash/check.
   - **Even Exchange** – Check this option if you are able to replace the item with the same or similar item.
   - **Gift Card Store Credit** – Check this option if the customer doesn't have a proper receipt.
   - **Needs To Be Called** – Check this option if someone from the Alva Store staff needs to call the customer because you are not sure how to handle the return. For example: something that we cannot order again.
   - **Credit to Credit Card** – Check this option if you are able to credit the customer's credit card.
   - **Waiting for Replacement to be Ordered** – Check this option if you need to do a special order as part of the exchange. For example: a book that was not printed correctly.
   - **Other (Explain)** – Check this option if there is a special situation for the refund or exchange. Write an explanation about the special situation concerning the refund.
6. **Important**!!! Attach a copy of the original receipt to the form (use the copier) and the new receipt (use the Reprint function on the register after transaction is done).
7. Write your name on the form so the Alva Store staff knows who to contact if they have any questions about the transaction.
8. Include any other information necessary for the Alva Store staff to understand the refund/exchange transaction situation.
9. Put the Returns/Exchange form in the inbox on the small desk.

Entering the Return in the Computer/Register Point of Sale (POS) system

1. Depending on the type of return, enter a negative one (-1) in the item field.
2. Scan or enter the amount of the returned item based on the original receipt.
3. If there is an even exchange, enter or scan the new item.
4. If applicable, repeat steps 1-3 above for each item returned and/or exchanged.
5. Press F2 to complete the transaction.
6. If you will be issuing a credit, select the form of credit that you will be issuing. (Cash, credit to credit card, or store credit/gift card).
7. If you will be issuing some type of credit, have the customer fill out the refund section on the receipt form.
8. Process the credit to the customer.
9. Reprint the transaction and staple it to the Refunds/Exchange form.
10. Put the Returns/Exchange form in the inbox on the small desk.

Holds

We **do allow** people to put regular priced item(s) on hold for one week.

We **do no**t allow holds on clearance items.

We **do not** allow holds on Christmas items.

Filling out a Hold form:

1. Write the date the customer put the item on hold.
2. Write the customer's name.
3. Write customer's phone number.
4. Write a brief description of the item(s).
5. Carefully tape the completed Hold form to the item.
6. Put the item in the hold cabinet.

ALVA Store

Quick Reference Guides for Point of Sale (POS) Procedures

*(*The Quick Reference Guides included in this sample.)*

NOTE: The information in this section is intended as a quick reference for some of the POS procedures that are performed on the computers/registers at the Alva Store.

Updated 2016 (The information in this section is updated as needed.)

GIFT CARD SALE

Procedure

1. Navigate to the POS screen.

2. By using the tab key or mouse, place the cursor in the **Item#/Price/Discount** text box, scan the back of the gift card.

3. In the **Price** text box, enter the dollar amount you want to add to the gift card.

4. Press **Enter** on the keyboard to move the gift card item into the sale item(s) table/list.

5. Press **F2** on the keyboard to subtotal the transaction.

6. Enter and receive the appropriate payment method from the customer
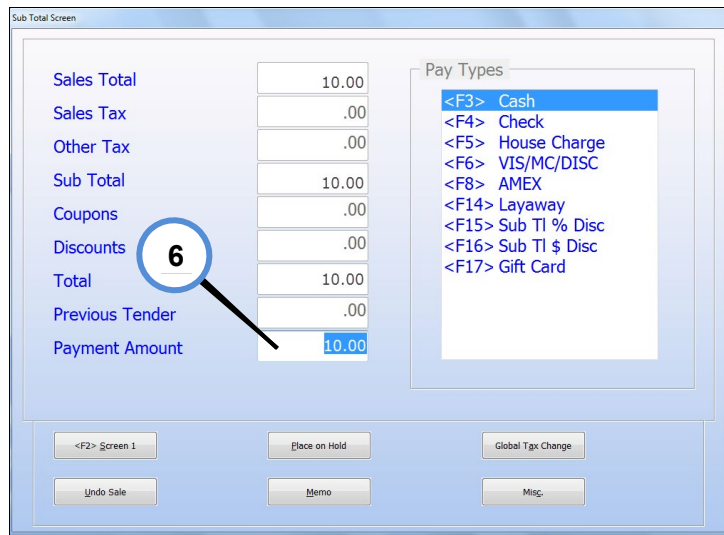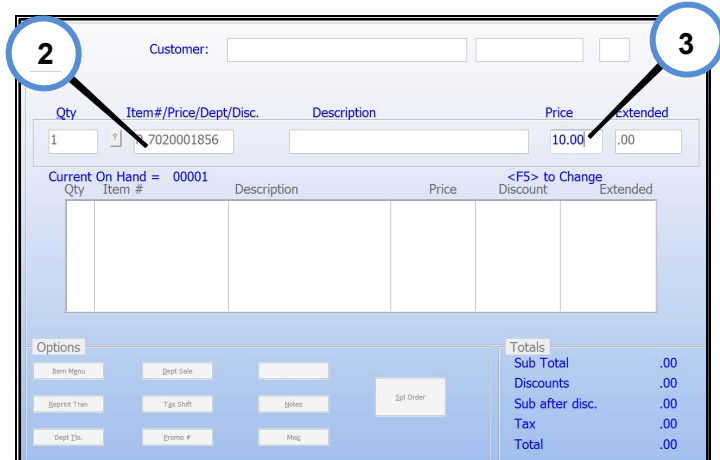
ADDITIONAL INFORMATION

The gift cards and complimentary envelopes are usually located on either end of the main customer counter.

We offer the sale of gift cards that can be used as a form of payment for future purchases at our bookstore.

Note No sales tax is added to a gift card purchase.

Note See the Receive Payment Methods Quick Reference for more information on how to receive various types of payments.

GIFT CARD BALANCE

Procedure

1. Navigate to the POS screen.

2. On the POS screen, click **Misc**. The Misc. Options screens displays.

3. On the Misc. Options screen, click **Gift Card Balance**. The View Gift Card Balance screen displays.

4. Scan the back of the gift card. The available balance dollar amount displays.

5. Click **OK** to return to the POS screen.
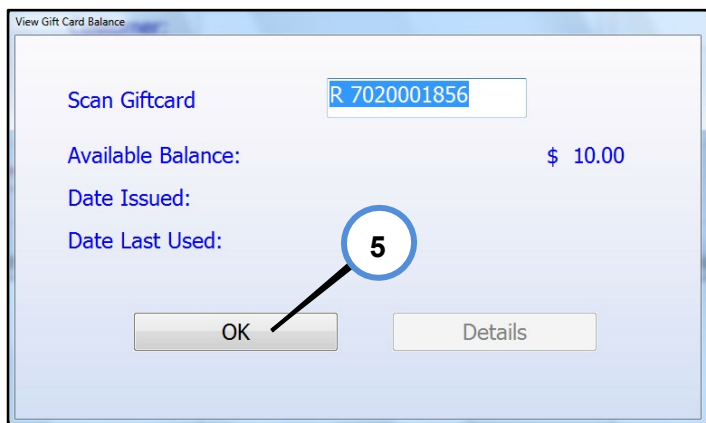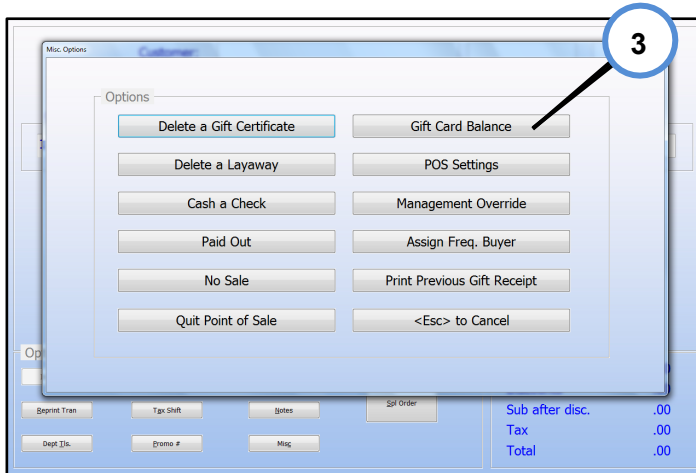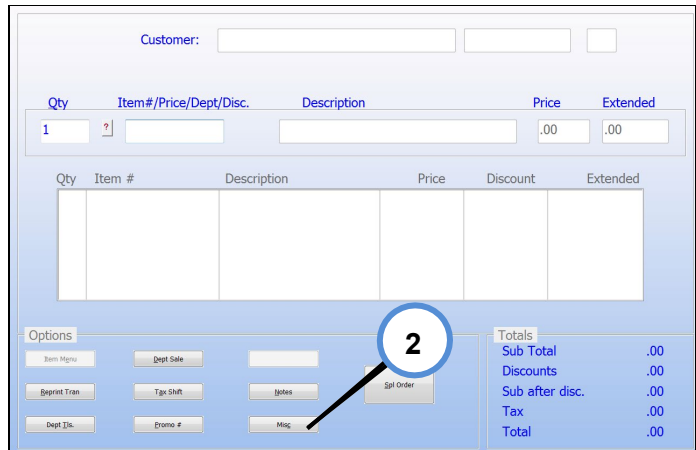
ADDITIONAL INFORMATION

Sometimes a customer does not know how much money (credit) is available on their gift card. You are able to check the gift card balance via the Miscellaneous option (Misc. button) on the POS screen.

IMPORTANT
When a customer is using a gift card as part of the payment for a purchase, it helps the customer know if the available balance amount on the gift card covers the balance due for their purchase. They may need to use a combination of payment types (For example: gift card and cash or credit card).

When the customer uses a gift card as a form of payment in combination with another form of payment, the **<F17> Gift Card** pay type must selected and scanned **first**.

LAYAWAY – CHECK BALANCE

Procedure

1. Navigate to the POS screen, click the **Misc**. button. The Misc. Options screen displays a list of options.

2. Click **Delete a Layaway**.

3. Place the cursor in the top entry text box (the "**#**" / layaway number), press **F3** to perform a search. A list of layaways displays.

4. Select the layaway you want to view.

⚠️ **IMPORTANT: DO NOT** click OK on the Delete Layaway screen because this will delete the layaway information associated with that particular layaway.

5. Click **Cancel** to exit out of the view screen.

Click the **"?"** icon to display the list of current layaway numbers/names.
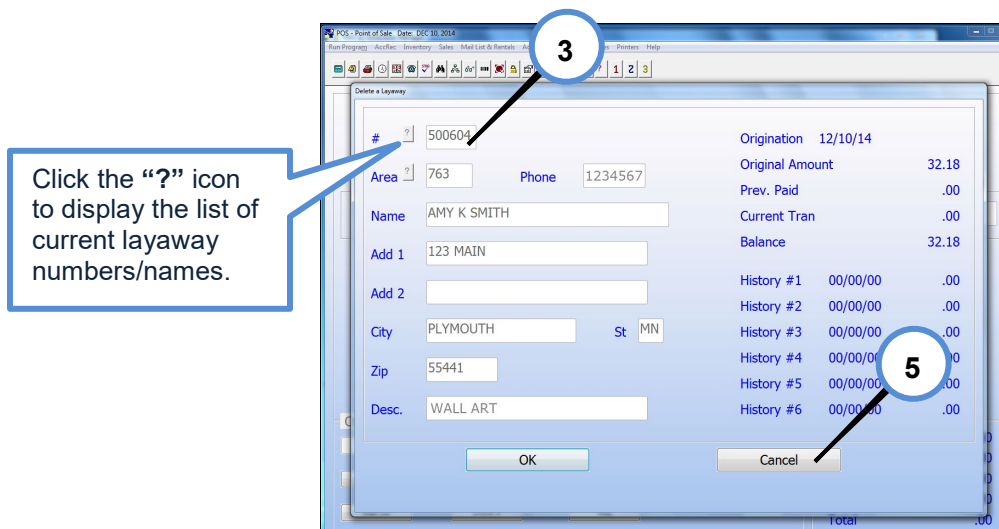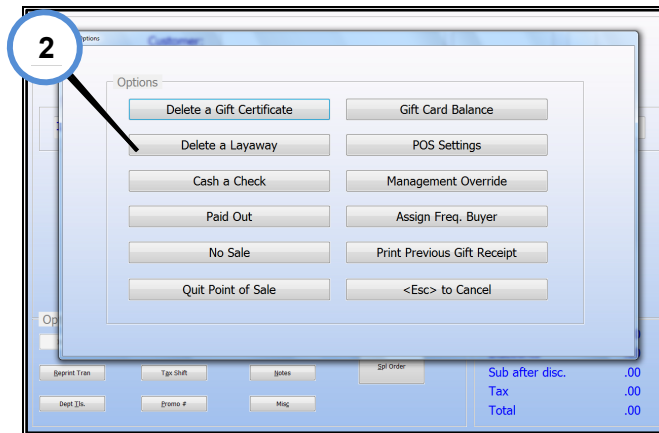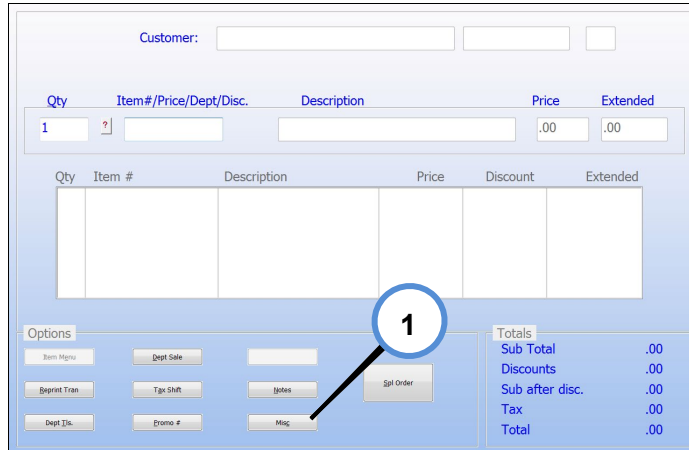
ADDITIONAL INFORMATION

You can search for a current balance on a layaway when a customer wants to know the balance due on their existing layaway.

RETURNS / EXCHANGES

NOTE: Only supervisors or staff should handle returns or exchanges.

Procedure

1. Verify the reason for the return, and ask the customer if they have the original receipt.

2. From the receipt, confirm the way the customer paid for the item.

| If paid by:	Then:
Cash/Check	The customer must have the receipt, and **only** if the receipt shows a payment in cash/check and receipt is more than two weeks old.
Credit Card	The customer must have the credit card that was used for the original purchase to issue a credit.
No Receipt (Confirm we carry the item in the store)	Issue a store credit (gift card) based on the current price of a similar item in the store.

3. Navigate to the POS screen, enter a minus sign and the appropriate number of items returned in the **Qty** text box.

4. Press the **Tab** key to move the cursor to the **Item#/Price/Discount** text box, scan the item or enter the dollar amount of the item. (If applicable, categorize the item.)

5. Press **Enter** on the keyboard to move the item into the sale item(s) table/list.

6. Press **F2** on the keyboard to subtotal the transaction.

7. On the Sub Total screen, select the appropriate form of credit from the Pay Types, and complete the appropriate refund/credit transaction with the customer.

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If entering a dollar amount, do not forget to categorize the item using the function keys.
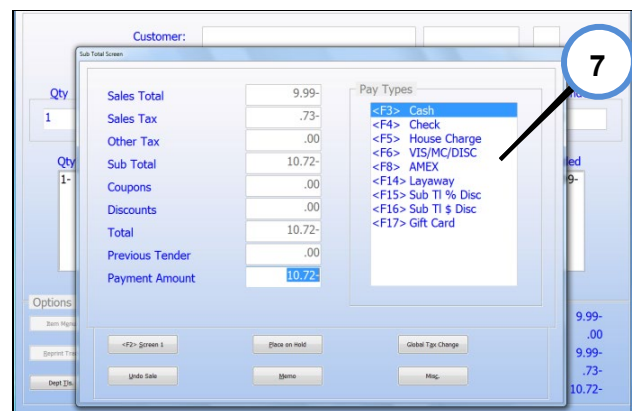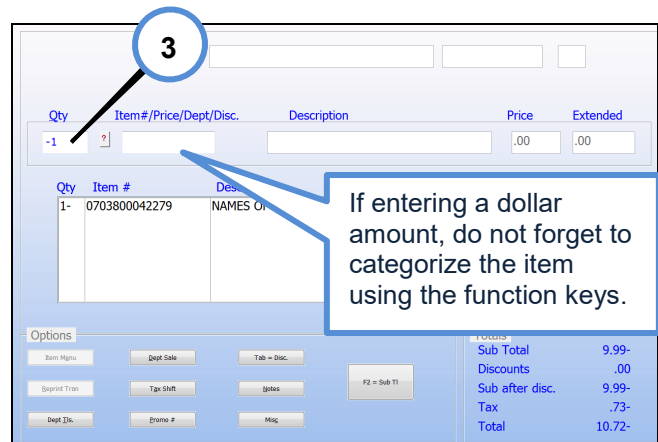
8. Make a copy of the original receipt (via the copier).

9. Print a copy of the new receipt by clicking the **Reprint Trans** button on the POS screen after the transaction.

10. Complete a Refunds/Exchanges (goldenrod) form with the appropriate information.

11. Attach a copy of both the original and new receipt to the Refunds and Exchanges form.

12. Place the Refunds/Exchanges form with the receipts in the inbox on the small desk.
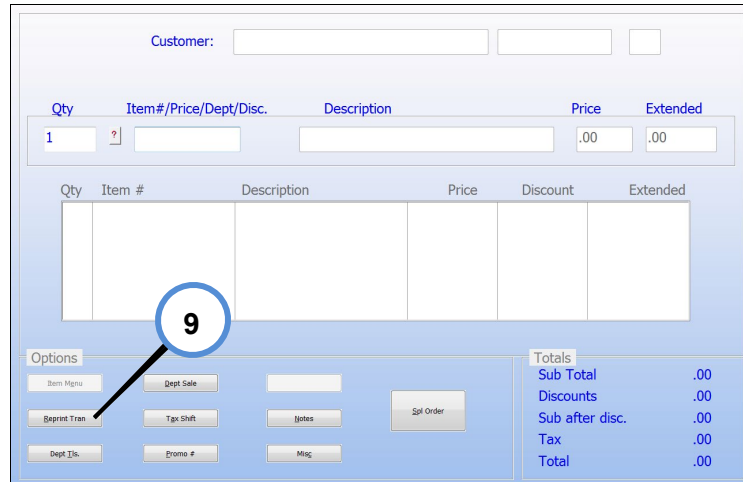
ADDITIONAL INFORMATION

Note   The Return policy is stated on the bottom of each receipt: A RECEIPT DATED WITHIN 30 DAYS IS REQUIRED FOR ALL RETURNS/EXHCHANGES. OPEN/DEFECTIVE MEDIA EVEN EXCHANGE ONLY.

Note   The only time this policy does not apply is around the Christmas season when customers are purchasing gift items for Christmas in October/November.