

VI. EMPLOYEE MARKETING AND SALES ATTITUDES:

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	The attitude of the owner sets the standard – are you setting a good example?							
2.	Smiles are freely given.							
3.	A friendly greeting is always provided.							
4.	Eye contact is made with each customer.							
5.	Undivided attention is given to each transaction.							
6.	“Hello” and “Good-bye” is said cheerfully.							
7.	A sincere “THANK YOU” is said after each customer purchase.							
8.	“Have a nice day” as well as other disingenuous phrases are eliminated.							
9.	Sales clerks are responsive to all requests.							
10.	Sales clerks are attentive and enthusiastic toward helping customers.							
11.	Sales clerks provide an appropriate amount of customer contact time.							
12.	An attitude of “Service Excellence” prevails.							
13.	Sales clerks follow-up on promises.							
14.	A follow-up call is made after the sale to determine customer satisfaction.							
15.	Sales clerks have high product knowledge (weekly product talk by a sales person or the store manager).							
16.	Sales clerks have an awareness of other products and can direct customers to the correct department.							
17.	Sales clerks wear name badges.							
18.	Sales clerks verbally give their name as they offer to help customers.							
19.	Sales clerks use the customers name when appropriate, but not excessively.							
20.	Sales clerks address customers respectfully and do not call them dear, dearie, honey, hon, sweetheart, sweetie, son, pal, bud, sport, etc.							
21.	Sales clerks have a pleasant phone demeanor.							
22.	Sales clerks identify themselves during phone calls.							
23.	Telephone callers are not left “on-hold” for more than 30 seconds.							
24.	If a customer has to be left “on-hold” for a long time, sales clerks estimate the amount of time or offer to return the customer’s call.							
25.	Sales clerks understand that customer’s who phone the store, generally want to buy.							
26.	Sales clerks have brand name awareness (feature-function-benefit).							
27.	Sales clerks are competitive and desire to make the sale, but are not aggressive and pushy.							

VI. Employee Marketing and Sales Attitudes Continued

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
28.	Add on purchases are suggested: socks with a purchase of shoes, tie with a shirt, earrings to coordinate with clothing, VCR with a TV, etc.							
29.	Sales clerks are aware of special sale items and their prices.							
30.	Sales clerks do not recommend a product be used in a manner not described on the label or directions.							
31.	Sales clerks help each other with bagging, price checks, returns, or long and complex transactions.							
32.	Attire of sales clerks is appropriate and professional.							
33.	Sales clerks are well groomed.							
34.	Eating, drinking, smoking, or gum chewing is not permitted in the sales area.							
35.	Sales clerks do not discuss or gossip about customers, friends, or other employees.							
36.	Customers can quickly purchase items as the cash register or POS system is never left unattended.							
37.	Efficiency is evident at the cash register when processing sales transactions – bags, pens, boxes, latest advertisements, credit card slips, etc. are readily available.							
38.	Shopping bags and gift boxes are provided.							
39.	Employees are empowered to make problem-solving decisions that will enhance customer satisfaction.							
40.	Employees are empowered to use ‘Best Judgment’ on returned items to help enhance customer satisfaction.							
41.	Sales clerks pay attention to items priced incorrectly, missing price stickers, or “switched” price stickers.							
42.	Sales Clerks understand that merchandise on shelves and racks are to be “straightened out” during slow periods.							
43.	Sales clerks are aware of suspicious persons or shoplifters and notify management immediately.							
44.	Sales clerks understand that both the cost of merchandise and the profit margins are to be kept confidential.							
45.	Sales progress goals are posted to determine YTD objectives.							
46.	Customer satisfaction surveys are conducted on a regular basis.							
47.	Sales clerks forward all complaints or suggestions to management.							
48.	Sales clerks understand their paychecks come from satisfied customers who return frequently to the store.							

VII. MERCHANDISING TECHNIQUES:

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	The store's dominant wall, aisle, or area has the best fixtures, best merchandise, and highest margins.							
2.	Merchandise is clean, fresh, and free from stains or damage.							
3.	Merchandise reflects current season and trends.							
4.	Tickets are properly priced and easily read.							
5.	Size, price, SKU # and special offers are correctly signed.							
6.	Old stickers are removed before placing a new sticker.							
7.	Sale stickers are removed after the sale and re-priced with new stickers.							
8.	Price stickers do not cover-up important product info: size, quantity, color, bar code, warnings, directions, etc.							
9.	Advertised goods are accurately represented in terms of quality, features, and price.							
10.	Advertised specials are well stocked (size and color) and are prominently displayed with sale price clearly marked.							
11.	Advertised specials are prominently displayed in window presentations.							
12.	Loss leaders are used to attract customers.							
13.	Sale items and advertised specials are located near the back of the store to gain maximum exposure for all products.							
14.	Signs are placed close to sale items and advertised specials.							
15.	Hand-written signs are kept to a minimum (use professionally printed signs).							
16.	Sale signs are removed immediately after the sale has been completed.							
17.	Signs are positioned so as not to interfere with traffic flow.							
18.	Manufacturer's displays and promo materials are utilized effectively.							
19.	Displays include plentiful quantities of items, sizes, and colors.							
20.	End caps are well stocked and well signed.							
21.	Inventory is pulled daily to keep shelves and racks fully stocked.							
22.	Stock is rotated so that older merchandise is sold first.							
23.	Employees are familiar with products and are able to answer customer's questions.							
24.	Employees are knowledgeable of the competition's merchandise, prices, and sales practices.							
25.	Outdated or damaged goods are quickly removed from the selling floor.							
26.	"Closed out" inventory and damaged goods are greatly reduced until sold out.							

VII. Merchandising Techniques continued

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
27.	Scheduling of the most productive sales people for the highest volume sales time slots has been implemented.							
28.	Store layout is updated periodically to reflect seasons and special sales.							
29.	Store layout is easy to shop.							
30.	Floor plan allows for adequate movement in aisles and around racks and displays.							
31.	Display space of an item is directly related to its sales potential.							
32.	Over-sized baskets or carriages are used to encourage additional purchases.							
33.	Cash register and check out area is easily located and is staffed full time.							
34.	Supplier's merchandising consultants are utilized to develop effective programs and strategies.							
35.	A merchandising plan that fulfills the objectives of the marketing plan has been developed and implemented.							
36.	The merchandising budget adequately supports the objectives of the marketing plan.							
37.	High margin impulse items are displayed near the cash register.							
38.	High margin items are displayed at eye level for maximum exposure.							
39.	High margin items or "specials" are displayed at aisle ends for maximum exposure.							
40.	A Planogram or dollars per square foot method is utilized to manage sales and profitability.							
41.	Related merchandise is generally located in the same or adjacent areas.							
42.	Pre-numbered cash receipts are utilized to track sales.							
43.	The profitability of each department is tracked weekly to maximize sales efforts.							
44.	The store is in compliance with all State "Unit Pricing" laws and regulations.							
45.	Window displays are colorful, attractive, and eye catching.							
46.	Window displays are changed regularly for special sales or for seasonal promotions.							
47.	Window displays are well lighted with the spotlight focused on a dominant prop.							
48.	Window displays have only ONE well-focused theme.							
49.	Window displays have one or two dominant, large, unusual, or colorful props that can be seen from "across the street" rather than lots of small items.							

The “Keys” for conducting the self-assessment is as follows:

NA	=	This tactic or strategy is <u>N</u>ot <u>A</u>pplicable to your business at this time.
Y	=	<u>Y</u>es, this is currently being done at a satisfactory level.
N	=	<u>N</u>o, this tactic or strategy is not being used.
NI	=	This area <u>N</u>eeds <u>I</u>mprovement and a timely strategy must be developed.
Priority	=	On a scale of 1 to 5 with “1” having the highest impact on image, customer service, employee satisfaction, ease of implementation, and profitability. The highest impact items should obviously be addressed immediately.
Responsible Person	=	The <u>P</u>erson <u>R</u>esponsible for improving or implementing this benefit or strategy.
Due Date	=	<u>D</u>ue <u>D</u>ate for completion of this strategy.