

Integrating New Technologies For Improved Workforce Management

By Lorna Pappas, Contributing Editor

Savvy consumers are walking into stores already well-informed about products and competitive data, and expect sales associates to know even more. Advanced workforce management tools help retailers oblige these educated shoppers. New approaches to training sales associates, measuring knowledge retention and streamlining task management help retailers empower store employees to deliver a great customer experience.

Stores provide the instant gratification of taking a product home directly after purchase, but “it’s the store employee that can really make a difference to the in-store experience,” according to a Retail Systems Research (RSR) study, titled: [WFM 2013: The Store Employee In The Customer Age](#). “While most retailers agree, most have only just tapped the surface of employee education and empowerment.”

As retailers work hard to reinvigorate the brick-and-mortar experience, “staffing the store with knowledgeable associates has become more important than ever,” said Paula Rosenblum, Managing Partner at RSR, in an interview with *Retail TouchPoints*. “In fact, in our most recent Store benchmark, retailers’ top operational challenges

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Furthermore, a white paper from Axiom Group, titled: [Focusing Your Workforce On The Moment Of Truth](#), revealed the significant impact employees have on the customer experience: As many as 75% of consumers surveyed said they would walk out of a store if they couldn’t access a knowledgeable associate.



The Axiom paper emphasized the effectiveness of e-learning in delivering customer experience training. While e-learning is nothing new, “it continues to improve at a rapid pace,” the report indicated. “Current e-learning solutions are rich, interactive, multimedia training environments that improve knowledge retention at significantly lower costs than traditional instructor-led training. [Their] videos, interactive presentations and self-assessments help consistently explain customer demographics, their journey and the role of the associate in the customer experience.”



Samsonite and **Ace Hardware** are immersed in WFM strategies that have integrated e-learning at their core: Both leverage digital WFM tools that increase associate knowledge, test comprehension and identify improvements areas. The goal of both strategies is to provide consistent, knowledgeable customer experiences that increase conversions and average ticket value.

Retailers must “reinvent their WFM tools for a digitally savvy workforce,” noted a study from [IDC Retail Insights](#). The report indicated that many retail employees “are much more likely to interact with peers and employers if communications are digitally delivered to their mobile devices.” In addition, modern WFM tools engage employees and enable them to serve the customer better, “which, by the way, creates a more satisfying work environment.”

Best-in-Class organizations are “more than twice as likely to invest in mobile learning solutions, compared to All Others,” according to a [November 2013 research report](#) from Aberdeen Group, which focused on developing and engaging the 2013 employee.

Providing tablets to keep training and information current, thus allowing associates to sell better, “is absolutely the smart way to go,” said James Dion, President of Dionco, Inc. “Besides arming associates with the same tools customers are using while in a store, knowledge through training is one very important way retailers can differentiate themselves. Providing the technology that keeps associates current will make that differentiation happen.”

App-Based, Network-Free Video Learning

Samsonite is moving digital learning out to the selling floor with associates through iPads that deliver non-streaming, app-based video training. Associates can access educational tools in real time without leaving the sales floor, when they are not busy with customers. The instant-on HD video content resides in the iPad app and can be retrieved at any time from the app, not downloaded from a network. With no downloading required, previous network-related challenges — including slow and halting video streaming and buffering, and stores' various available bandwidths — are eliminated. Samsonite associates can click on/off bookmarked, two-minute WFM training segments that play immediately and smoothly, and efficiently increase Samsonite associates' product/procedure knowledge.

The interactive, easy-to-modify video training app platform — called **QuizScore**, from **Multimedia Plus** — “provides our store teams with what we believe are the best training tools,” said Fred Peirce, Manager of Store Operations at Samsonite. “These include HD video content, an engaging interface, interactive quizzes — overall, a more interactive training experience — all without having to wait for video to ‘buffer.’”

Because Samsonite stores maintain different levels of Internet services and speeds, “we needed to assure that an upgraded training experience would be the same for everyone,” Peirce explained. “The non-streaming approach to video training offers us the opportunity to provide best-in-class, ready-to-play, consistent video content for each associate, without the need for streaming. With no load times required for associates taking the training, there is very quick turnaround from the time they start a segment to completion. Our store teams are excited about this new training approach, and employee engagement is up.”

The QuizScore platform includes tracking software that allows Samsonite to measure training effectiveness. Managers can determine where employees need improvement and how best to refine programs by regional, district and store levels. The cloud-based database enables managers to access immediate results of associate learning and development from any location.

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“Our management team is excited that, through QuizScore, they can track associate development within their respective areas,” Peirce said, which allows “instant visibility” to training progress across the board.

“As a retailer, and as consumers, we continue to see a strong movement to be more mobile, tech-savvy and informed,” added Rob Cooper, VP and GM of Retail and E-Commerce at Samsonite. “We knew that these marketplace trends needed to be adapted to our associates’ in-store experiences as well. In today’s retail store environment, it’s become ever more clear that we must be cognizant of how our brand appears not only to our customers, but also our associates. With that thought in mind, we wanted to re-create our training with updated training content and video relevant to our business today.”

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E-Learning Boosts Skill Level And Sales At Ace Hardware

Ace Hardware associates are kept current through a 10-step program designed to enhance the customer experience at the store level. Called Helpful 101, the chain-wide program provides an online, interactive associate e-learning platform focused on two competencies: Creating a great customer experience and building sales. The digital WFM tool was developed through a partnership with **Cinecraft Productions**, an e-learning development and video production company.

Helpful 101 is a role-base course with video scenarios, simulations, games, expert coaching sessions and online assessments. The program includes exercises that associates take to the selling floor to reinforce what they have learned online. Consumers evaluate associates’ helpfulness and product knowledge via online surveys providing real-time feedback. Each associate must complete a follow-up digital learning course every two years.

Helpful 101 has “more than paid off” for Andy Carlson, an owner of two Ace Hardware stores in Denver, Colo. After implementing the Helpful 101 WFM tool, Carlson has seen “an increase in the overall skill level of our associates,” he told *Retail TouchPoints*. “Associates completing the e-learning course do a better job of helping customers, which increases conversion rates as well as the average ticket, because customers leave with everything they need for their projects — and maybe some sale items, too.”

Carlson and his management team evaluate all consumer feedback on associates and the customer experiences provided; if necessary, managers take direct action to change processes and re-educate associates.

Knowledgeable associates are key to distinguishing Ace Hardware, Carlson stated: “Our primary differentiator versus other home improvement retailers — especially those online — is our ability to provide helpful customer service. Home improvement projects can be difficult: Customers need tips and tricks for the products we sell to help them complete their projects.” Based on Helpful 101 results, “we leverage our most experienced associates in each discipline to provide the best advice possible to every customer.”

Though it is too early to attribute sales increases solely to Helpful 101, “we have seen increased year-over-year sales and gross margins every month in the last four months since implementing the Helpful 101 curriculum,” Carlson said. The WFM approach “guarantees consistent service for every customer, every time. It is part of our associates’ job requirements: They must be certified as ‘Helpful’ to continue working in our stores. During March 2014, we will be integrating Helpful 101 into the hiring process with an online interviewing component. This will enable us to accurately gauge a candidate’s helpfulness before we hire them onto our team.”

Helpful 101 is “comprehensive, repeatable and measurable,” Carlson said, “and a cool tool to get into the hands of all of our associates. When you combine this WFM system with the passion of local retailers and their strong desire to serve their communities, you really have a great formula for success.”

Task Management Helps Align Staff With Changing Store And Customer Needs

Trained, knowledgeable sales associates can deliver great in-store customer experiences, but their tasks must parallel shifting labor requirements, available capacity, budgets and customer demands. Sophisticated, real-time task management tools allow retailers to create, assign, allocate and control tasks for optimized staff performance and increased customer satisfaction.



“Task management is critical to the future of retail,” said Ken Morris, Principal, Boston Retail Partners. “We see ‘real-time retail’ as the future of bricks and mortar, mobile and web interaction with customers or unified commerce. The key capability in this new real-time retail paradigm is to be able to

sense and respond via workforce task management to the challenges posed by changing market conditions — weather, product movement, regulations, recalls, etc.”

Pier 1, Sunglass Hut and Modell’s Sporting Goods are among the retailers integrating advanced and real-time task management tools for streamlined task planning, communications and execution. The tools help all three retailers align staff with changing store and customer needs, reduce costs and place a greater focus on customers.

Pier 1 Moves From Paper And Pen To SaaS

Until 2010, after 49 years in business, **Pier 1 Imports** used pen, paper, Excel and Access to manage tasks, schedules and other WFM requirements. Then with 20,000 employees (now 27,000), the company advanced to a SaaS-based WFM suite to optimize and streamline corporate workflow and store workloads, and drive execution compliance.

The hosted Ceridian Dayforce WFM solution “has helped us drive sales because tasks are addressed by the right people with the correct skills in the appropriate places at the right times,” said Sharon Leite, EVP of Sales and Customer Experience for Pier 1, in an interview with *Retail TouchPoints*. “We see labor costs as a percentage of sales continue to decrease.

In addition, our customer experience metrics continue to rise, based on a survey tool we use to measure how well tasks and staffing are aligned to customers’ needs.”

Today, rather than employing up to four full-time managers and assistant managers per store, Pier 1 manages tasks and other operational requirements with one full-time store manager, one full-time assistant and several part-time associates.

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In addition, Ceridian Dayforce WFM allows Pier 1 to ensure compliance, preventing costly violations of hour and wage laws, company policies, and other regulations, and accurate activity-based costing.

Crate and Barrel also leverages a Ceridian Dayforce tool to help store managers and associates do their jobs more effectively, [as previously reported by Retail TouchPoints](#). The solution “helps us look at our associates’ responsibilities and tasks, and remove everything that would interfere with their customer interactions,” stated Katherine Haliski, VP of Retail for Crate and Barrel. Solution data determines the best associate-to-customer ratio at specific times, and helps the retailer distribute tasks so employees can get the most value and enjoyment out of their positions.

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Retail-Sunglass Hut

“Approximately 75% of today’s retail IT spend is focused on store operations, which tells us that retailers are still very focused on the importance of the store,” said John Orr, VP of Retail Strategy and Execution at Ceridian Dayforce. “Stores, store associates, and leveraging the store experience are all critical to operational performance in retail. Having visibility into service and non-service work and costs help retailers avoid conflicts in task work and conversion — giving task management complimentary value in overall work planning and execution.”

Sunglass Hut Employs Single-Source Task Management

Like Pier 1 Imports, **Sunglass Hut** also moved from outdated task execution — using a mixture of email, spreadsheets, paper packs and mail bags — to a sophisticated task management solution. Reflexis Task Manager is an integrated, closed-loop management tool that leverages a single channel of communication to streamline store execution. This single source helps corporate, store and field managers better plan and communicate objectives for optimized productivity. The solution also provides real-time feedback and visibility of task compliance: Changes are flagged and updated inline within each project, so stores easily can manage by exception, take corrective action and assure task consistency.

“We’re very focused on providing a single, prioritized place for managers and associates to view their tasks and best create a fabulous experience in our stores,” said Cindy Wise, Senior Director of Communications and Store Execution, Luxottica Retail-Sunglass Hut. “When you go into a Sunglass Hut, you should have a consistent experience with each phase of our customer engagement strategy, from Invite, Engage, and Interact to Appreciate.”

The Task Manager application created for Sunglass Hut sends communications geared toward each type of retail store format in the chain. Action items include project type, start, due date, status and more. Associates can filter and search for action items, which are color coded so that managers can quickly see each task and status.



Two-way feedback allows Sunglass Hut stores to provide comments regarding successes as well as improvements for specific tasks or projects. Comments are collated and summarized so that Sunglass Hut can identify task issues and trends rapidly and respond accordingly. "We love the feedback comments," Wise said, "because what would have taken weeks to bubble up before now gets immediate feedback."

Without a single-source task management system, task compliance is almost impossible to track, even with email, because "no one at headquarters has time to read emails from thousands of stores regarding dozens of projects, then re-enter that data into a spreadsheet," said David Andrews, Director of Marketing Communications at Reflexis. "Yet many retailers still force store managers and associates to use this antiquated, error-prone method for executing the tasks that support the chains' customer engagement strategies. Task management solutions enable retailers to coordinate planning, measure results and ensure consistent store-level execution. In addition, real-time execution frees store managers and associates from tedious, manual processes while guiding them to make better split-second decisions and provide enhanced shopping experiences for today's 'I want it now' shoppers."

Modell's Provides Better Customer And Selling Experiences

At **Modell's Sporting Goods**, the EmpowerTask tool from Empower Software Solutions provides seamless, closed-loop task management for better customer and selling experiences. Used in concert with an existing EmpowerWFM implementation, the EmpowerTask task management tool provides Modell's with timely insight into store performance and the ability to optimize and prioritize store tasks. The solution integrates store tasks into the daily workforce plan, enabling activities to be confirmed as completed. EmpowerTask helps to "enhance the store experience for both our associates and customers," said David Strobel, SVP and CIO of Modell's. The overall WFM effort is part of Modell's "key initiative for 2014," which is to "improve our real-time execution in our stores."

Today's retailers face a very challenging landscape, are competing with online retailers, and working harder than ever to turn shoppers into buyers, noted Joe Olson, GM of Workforce Solutions at Empower Software Solutions. "The need to react quickly to a very dynamic environment has resulted in more tasks for the store. Using email and other methods for managing store communication falls apart as volume continues to increase. The search for a better method has created a lot of conversation and value in the market."

The dynamic of full- and part-time status also is top of mind, with many new compliance requirements falling to store managers to track and resolve. Ultimately, more part-time employees result in more task management. "Retailers need WFM tools that simplify their day," Olson said, "and eliminate any activities that are not a value-add to the store."

As retailers continue to embrace technologies that turn corporate strategies into store-level action — then educate associates on these and other WFM tools — they will more than just tap the surface of empowering store employees to deliver a great customer experience.





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