



**Prism Retail Services**

**MERCHANDISER**

**TRAINING AND TESTING**



**Prism Retail Services**

# **MERCHANDISER TRAINING AND TESTING MANUAL**

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# INTRODUCTION

## *WELCOME TO PRISM RETAIL SERVICES MERCHANDISING*

**M**erchandising is presenting products in their best light to generate more sales. Whether you are buying at a Target, CVS or Staples, chances are your buying decision has been influenced by the way the products have been merchandised.

Your position with Prism as a Merchandiser will be both rewarding and challenging. In your role, you will be expected to help major manufacturing and retail companies present their product to the best advantage in the retail environment. The expertise and experience of qualified merchandisers provides the framework for customer satisfaction and Prism's commitment to quality.

Merchandising is a professional career choice. As in other professions, those who continue to improve their abilities, develop more proficient skills, and prove themselves along with their performance may be rewarded with advancement opportunities and increased compensation.

## HOW TO USE THIS MANUAL

The purpose of this manual is to provide Prism with the most professional, trained and competent merchandiser work force available in the industry. There are seven (7) key components to this manual including:

- Customer Service
- Work Place Safety
- Merchandising Basics
- Time Management
- Team Skills
- Problem-Solving
- Glossary of Merchandising Terminology

Prism will provide you the opportunity to take an [On-Line Competency Test](#) at the end of this training manual and at the end of each chapter in which you will need to demonstrate the understanding and skills necessary to perform merchandising at the retail level.

## CUSTOMER SERVICE

As a merchandiser, you are responsible for interacting with customers and providing reliable, high quality merchandising. Did you know that . . .

- **13% . . . Of people will tell more than 20 people about their bad experience?**
- **90% . . . Of Unhappy clients will not do business with that company again?**
- **95% . . . Of customers WILL return if an issue is resolved quickly and efficiently?**

### ***Who is your “customer”?***

Customers can be any or all of the following:

- The merchandising company that hired you or contracted with Prism
- The retail store where you are performing the work
- The manufacturer or third-party who is paying to have you do the work
- The customer in the store who will be buying the product
- Fellow merchandisers who are part of your team

While all the “customers” listed above are equally important and each have different expectations of you, they all share the same purpose. It is the responsibility of each employee to:

1. Offer assistance to any store personnel in any way necessary as it relates to the job at hand.
2. Always be prompt and courteous in any and all requests
3. Offer to refer any special requests to proper Prism management
4. Offer to assist store customers of the stores in which Prism works
5. Present oneself as a professional employee of a professional service organization
6. Always offer a smile to customers

***Prism’s pledge is to offer not just service, but to build good working relationships and partnerships to foster a spirit of trust in day to day activities. A “bend-over-backwards” attitude is the expectation of all Prism employees.***

To the best merchandisers, customers are important people; you care about them and want to meet and exceed their needs. Below is a list of expectations when speaking with a customer:

### **Ethics / Work Quality:**

- Always perform the work completely and accurately and report your work in a timely manner.
- Remember that your actions reflect on the client and the store's image. Within the stores, and in all your contact with store personnel, Prism expects that you conduct yourself in a professional manner, including appropriate and professional dress, language and treatment of team members, customers and store employees.
- Prism's customers trust merchandisers with their promotional products (coupons, rebates, tools, etc.) Do not abuse this trust. All tools are to be returned to the store in the proper location. If you are not sure of where a tool/product belongs, ask store management for assistance.
- Work your scheduled hours by showing up on time, taking scheduled breaks and finishing within the allotted amount of time.

**Remember, Prism is a service provider and service is our product. The only product you have is what you can do for your customers.**

Merchandisers who "bend over backwards":

- Pay attention to the small details that are important to the customer
- Know the customer—different customers have different expectations
- Represent Prism with the highest standard of quality and productivity
- Get the job done quickly without compromising quality, adding value to the service provided
- Follow through on commitments and act ethically and honestly
- Complete it right the first time

Remember customers cannot return "bad service". It is up to you, as a professional merchandiser, to perform above and beyond the customer's expectations on each and every assignment/project.

**Service needs to be consistent... good quality service today and everyday.**

 Test your knowledge

1. Fellow co-workers on your team are not your customers/clients.

True

False

2. Your actions reflect on Prism and Prism's customer.

True

False

3. Appropriate manner and dress represent good customer service.

True

False

4. Merchandisers are encouraged to "bend over backwards" and build strong relationships with customers, vendors and team members.

True

False

5. Providing high standards of quality and productivity is a function of customer service.

True

False



# WORKPLACE SAFETY

Accident prevention is a fundamental requirement of your position as a merchandiser. It is the responsibility of each merchandiser to adhere to all safety standards set forth by following Prism's established safety policies and procedures. Prism will make every effort to provide a healthy and safe work environment for its employees. We are dedicated to eliminating the possibility of injuries and illness resulting from accidents in the workplace. **Working safely is a requirement of the job.** Merchandisers are expected to assist management in accident prevention activities. **Unsafe conditions must be reported immediately.** No employee is expected to work in an unsafe environment.

## Safety Hotline

- In order to create the safest work environment possible, Prism has a service for all employees entitled the Safety Hotline. Employees should call with safety related questions, questions regarding Safety policy and procedures, and general health guidelines.

1-800-808-1992 HELP (4357)  
Safety Hotline

## Accident Prevention:

Some of the more common accidents in the retail industry include:

- falling on a slippery surface or stairs
- lifting injuries such as sprains and strains
- falling from a ladder or stool
- tripping on a rough surface
- injuries from repeated movements
- cuts or punctures from tools or products such as box cutters or cardboard

## Slips, Trips & Falls

Slips, trips and falls are among the most serious accidents that occur in retail stores and similar work environments. Some precautions include:

- Wearing rubber soled shoes that enable you to move comfortably and maintain firm footing – open-toed shoes or sandals are not permitted.
- If you see a spill, clean it up immediately. Do not ignore the spill; when you fail to clean up or notify someone that the spill exists, someone else could slip, fall and injure themselves.
- Keep aisles and doorways clear of boxes, product, fixtures, tools, and other items.
- Equipment used for work should not be left unattended on the sales floor
- Working area should have equipment kept neat, organized and to the side to ensure room for other's to pass without creating a tripping hazard.



## Ladders:

- Use only pre-approved step stools and ladders. Never stand on a crate, tote, flattop cart or shelving.
- Always carefully step up and down on each step. Never jump off a ladder or stool.
- Open the ladder completely, check for loose rungs damage to rungs or braces, and proper footing.
- Step in the center of the rungs and hold onto the ladder when climbing—always have two feet and one hand or two hands and one foot on the ladder.
- Don't climb higher than the second step from the top on a step stool and the third from the top on a straight ladder.
- Don't over extend your reach at the top of a ladder, move the ladder to optimize the location for reaching
- Only one person should be on the ladder at a time.

## Lifting Injuries:

Improper lifting is the greatest single cause of back pain and injury, so it is important that merchandisers learn and practice good lifting techniques. Remember, if you think you need help in lifting, make sure you ask for it!

Some hazards to watch for in lifting include:

- Lifting of heavy objects
- Twisting & lifting at the same time
- Reaching for objects instead of using a ladder
- Bending and overextending



## Correct Lifting Techniques:

- Stand close to the object you are lifting and plant both feet firmly on the floor, about shoulder-width apart. Point your toes out.
- Squat down close to the object with your back straight, knees bent and stomach muscles tight. Lift with your legs, not your back.
- Grip the object firmly with both hands, not just your fingers.
- Stand up slowly, keeping your back straight and letting your legs do the lifting.
- Avoid bending from the waist. Keep your knees bent and back straight when lifting from the ground.

## Unloading Trailers:

- Use a stepladder, ramp, or other approved device to gain access to the trailer – never use a pallet as a ladder.
- Watch for improperly stacked items as they may become loose and turn into falling objects.

- Don't jump out of a trailer! A jump from a short height (such as the back of a trailer or loading dock) can cause serious injury. Always use steps or a ramp to enter and exit the trailer.
- Be cautious of floor conditions such as uneven ground, rain, snow, ice, or other hazardous conditions.

### Use of Box Cutters

- Always cut away from your body
- Keep your spare hand and other items out of the way of the blade
- Close the blade when not in use
- Box cutters should only be used on cardboard boxes
- Always keep a sharp blade; dull blades are more likely to cause serious injury.

### Safety Check-List

- Do not overestimate your own strength.
- Walk, don't run; to prevent slips and falls.
- Use equipment – hand trucks and dollies as opposed to lifting alone.
- Break a large load into smaller loads.
- Remove any objects you might trip over.
- Check the object you'll be carrying for rough or jagged edges.
- Wear gloves with a good grip.
- Wear safety shoes with rubber soled shoes.
- Push – don't pull if the load is too heavy or too large. NEVER try to push items with your legs.
- Ask co-workers for assistance.

### Driving

- Always wear a seat belt when driving. Insist that all your passengers also wear their seat belts.
- Make sure you drive the speed limit and obey all posted signs and laws.
- Do not drive if you are tired or using medications with driving restrictions.
- Plan enough time to arrive at your work site on time. Do not rush.
- Observe all traffic ordinances while driving a company-owned or rented vehicle. You are responsible for all traffic violations that occur while you are driving for work.
- Do not drink and drive while working. This includes after-hours drinking and driving if you are staying overnight in a company-paid hotel. Legally, you are still responsible to follow Prism's policy of driving safely even though you're not officially on a work site.

Most people blame accidents on unsafe conditions. But, in truth, most accidents are caused by unsafe behaviors. The best way to eliminate accidents is to avoid unsafe practices.

# **Prism's goal is ZERO accidents. Always do your part in creating a safe environment.**

## Test your knowledge

1. Merchandisers are held accountable for unsafe behavior.

True

False

2. When using a box cutter, pull the blade slowly toward yourself for best control.

True

False

3. It is the store's responsibility to handle spills and debris in the aisles to avoid slip, trips and falls. Merchandisers need to concentrate on the project they are assigned, not worry about store conditions, or safety.

True

False

4. When lifting a heavy or awkward object, bend at the knees and keep your back straight.

True

False

5. Unsafe conditions are to be reported to the Safety Hotline and corrected when possible.

True

False

# MERCHANDISING BASICS

## SKILLS FOR THE SUCCESSFUL MERCHANTISER

As a merchandiser, what you do for one customer might be completely different from the expectations of another customer. Therefore, it is extremely important that you understand basic merchandising skills before working on your first project.

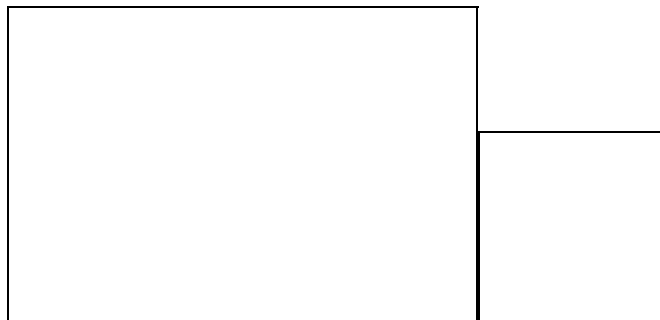
**In the following pages, you will learn the essentials of merchandising including:**

- Starting Your Day
- Planograms
  - Components of a Planogram
  - Process for Setting a Planogram
  - Finishing Up
- Fixtures

### Starting Your Day – Come Prepared

In merchandising, every day can be different! It is the excitement of knowing that the work is not boring that brings thousands of people to the profession of merchandising. While each day's work varies, there are some basics that you need to keep in mind for any project. Prior to heading to the work location:

- Be organized. Have all the information supplied for your project with you and review it prior to the actual store visit.
- If you have several stores to visit, make sure you have directions to each store location (if you are not sure, call the store for specific directions).
- Make sure you have all the necessary forms, planograms, project directives and instructions for that specific project.
- Are tools required? Have a box cutter, hammer, screw driver, measuring tape, step stools and any necessary tools outlined in your instructions. Don't forget a pen/pencil.



Arriving at the work location:

- Don't park in the prime parking spots. Those spots are reserved for customers. Always park at least 5 spaces from the front of the store.
- Have your name tag on and visible to the store employees.
- If the store requires you to sign in, do so. Greet the store personnel and introduce yourself as a Prism employee.

## Planograms

The best way to describe a Planogram is that it is a design or "map" of where each item is placed on a shelf, peg hook or fixture.

Planograms are computerized blueprints developed at a store's headquarters. They are designed to ensure that the retailer has the desired product displayed to the customer as well as the optimal inventory on each shelf after each merchandiser sets the display. Knowing how to read and implement a Planogram is one of the most important skills a merchandiser needs to have. It's not difficult to learn how to read and work with planograms and once you have mastered this skill, it will make your work far easier and rewarding.

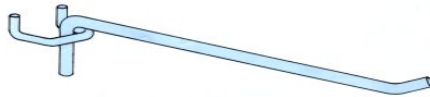
## Components of a Planogram

- Cover Page – Some companies will have instructions, fixture accessories, signing and POP materials listed on a cover page. Other companies will save the paper and list all information on a schematic page. **It is important that you read any and all instructions on the cover page or the schematic.**
- Schematic – all planograms will have a schematic or picture page. This is usually the computerized drawing of the planogram, showing all the details to set it accurately. It will show the set date, how many shelves and peghooks you will need, details about the product placement, the width, depth and height of the planogram, and sometimes placement of promotional materials. Planograms are typically set in 4ft sections. Each box on the planogram represents a product facing. Numbers on the product facing are called Loc ID's and will cross reference the schematic to the UPC Listings which will give you more information about each product.
- UPC Listing or Listing page– This is a listing of all the products that go on the planogram. It usually will start with the Loc ID that is on the schematic followed by the number of facings, the UPC number, the product description and other information about the placement of the items. The UPC (Universal Product Code) listing or Listing page will give you information to identify the product.

## Process for Setting Planograms

### Before you start:

- Before you start setting the planogram, make sure you have all the necessary supplies and materials (including cleaning supplies, labels, any new fixtures, or fixture accessories such as new shelves or pegs).
- Locate the new product for your set or project.
- Check with store personnel about obtaining containers or totes to store deleted (discontinued) and over-stocked items. Verify what you need to do with deleted/damaged items.
- Ensure that you will be working from the correct planogram; section size can vary by store. Count the shelves already in place. Make sure you have the correct size shelving before you start removing product.
- Always have the correct number of Peg Hooks and label holders before you start. Hooks come in many shapes and sizes. Make sure you have the correct sized hooks.



- Find out if there is Point of Purchase (POP) needed for this planogram. Typically the POP material or any additional signing needs will be listed on the cover page or schematic page.

### Setting the Planogram

- **Setting 4ft sections vs. the entire POG** - Setting a planogram during store hours can be a challenging task. In most cases you will have customers making purchases off the aisle that you are working; therefore it is policy to keep the area as shoppable as possible. Many stores will want you to work in 4ft sections vs. resetting the entire POG at one time.
- **Planogram reset vs. Revision or update** – Knowing the difference between a Planogram reset and a Planogram update will save you lots of time. A revision means you will only remove certain products and replace them with new ones. It also means you will not have to take down the entire Planogram and rebuild it saving valuable time. Study your instructions, it will tell you if the change is a reset or a revision update.

## Planogramming Process

- If discontinued product has not already been pulled by store personnel, pull it and place it in the designated tote or box. Clearly mark the discontinued product and keep separate from new items and overstock items.
- Working one shelf at a time, remove all products that will remain with the planogram reset and group it together on a work space or in totes. Move the shelf label with the product; keeping labels (and prices) with the product.
- Always clean shelves and shelf tag channels as needed. Use a good cleaner and paper towels provided by the store. Remove stickers, price tags and POP materials (be sure you do not destroy POP materials that may be reused).
- Remember to keep product, cleaning supplies and additional shelving out of the main aisles and away from customers. It is your responsibility to keep the work area safe and shoppable.
- Set the shelves to the proper profile or heights. Most planograms will tell you where to set the shelves height above the base either by inches or notches along the side. You will need to measure to set the shelf correctly. Shelves deeper than 15 inches require two people to adjust.
- Place the product listed on the planogram onto the shelf. Insure that proper items are placed in the correct location. Verify the product using the UPC listed on the planograms.
- When the actual product is not in stock, place another product with the same dimensions temporarily faced backwards (dummy facing) to ensure correct space is left on shelf. Start on bottom shelf and work up one shelf at a time.
- When setting a planogram with peghooks, take the time to count the holes on the pegboard correctly. The peg holes will either appear on the schematic or locations will appear on the line listings that give you indication numbers for each peg.
- If you are setting a combination shelf/peghook planogram, set the shelves first from the bottom up and then set the peghooks from the top down. Adjust where needed. There are a variety of peghook sizes. Make sure you have the correct peghooks for the planogram.

## Resetting the new Planogram

- If the planogram calls for any specific fixtures, such as product pushers, front rails and dividers etc., make sure they are placed according to the planogram. Place all the point of purchase materials or additional signing on the POG.
- Ensure that all product fits on the shelves and peg hooks that you have placed in the POG. If there are issues with fit, check with your team leader for best practices.
- After all changes have been made and all product (don't forget the new items) are placed on the shelf, place labels correctly according to the planogram. Decide what labels are missing and make new labels according to the store's policy. Labels are usually placed under the left hand edge of the product.
- Any product that does not go back into the set needs to be reviewed. Check the discontinued list again for items that may have been missed. Some items may need to be relocated. Check your planogram for a list of relocated or cross merchandised product. Any back stock or too much of one product to fit on the shelf should be put into totes or boxes to go to the stock room. Clearly mark overstock boxes and totes.

## Finishing Up

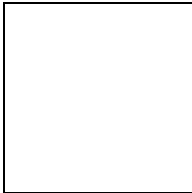
- Have your Team Lead check your finished planogram. Make any necessary adjustments.
- Clean up – Make sure you leave nothing behind. Check that debris and supplies have been removed from the aisle.
- Return any cleaning materials supplied by the store to the proper location.
- Throw away any trash; put back any unused shelves, pegs, etc.
- Discontinued, damaged and outdated merchandise has to be brought to the attention of store management for disposition. Never take any product home with you.
- Follow the store's specific procedures on where to put the merchandise and how it should be boxed.
- Sign out on your way out of the store



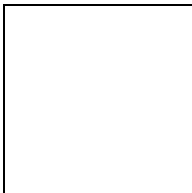
- Follow up with the necessary paperwork, computer reports, etc. in a timely manner (according to your project requirements).

Working for Prism could involve many different aspects of merchandising. Here is a sampling of the work we perform

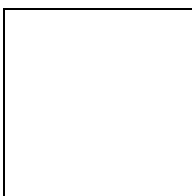
- Cut-Ins
- Category Resets
- P.O.P. Set-Up
- Display Building
- Fixture Installations
- Display Building
- New Store Remodeling
- Customized Audits
- Data Reporting



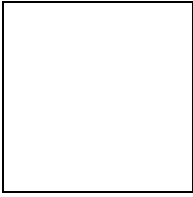
Switch out individual items or whole product lines for new item replacement. This may involve one shelf or an entire set section.



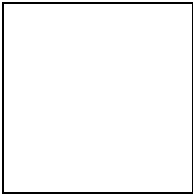
Complete category change out may involve seasonal items or resetting to new profile and product flow.



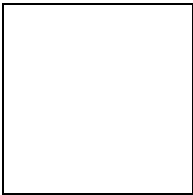
Endcaps, permanent or temporary displays can be set up labeled and filled by our expert merchandisers.



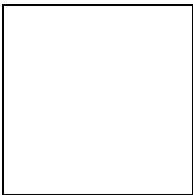
Install manufacture custom displays, free standing units or in-line fixtures.



Build and position new displays in a timely manner.



Complete new store set up or a remodel in an existing retailer. Prism teams are trained to handle it all.



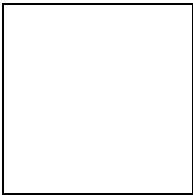
Pricing surveys, audits, compliance and product availability are all reporting functions that may be completed by the Prism team.

Bottom line: it all comes down to people. Our Prism teams are the most skillful, the smartest and the best trained in the industry.

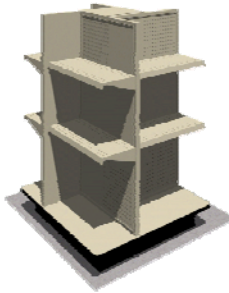
## Fixtures:

90% of planograms are set on the gondolas varying in sizes from 2ft to 40 ft. or more. There are other types of fixtures that will also use planograms to show the placement of product. Some other types are 4-ways, Spinners, Greeting Card Fixtures, Endcaps, Cosmetic Fixtures and finally Walls. The basics that we talked about above can be used with all fixtures and it will enable you to set most any planogram.

### Gondola



### Four-sided fixture

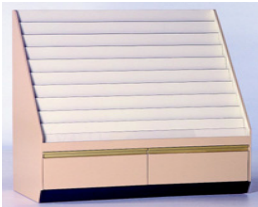


### Spinner Rack



### Greeting Card Fixture

#### Endcap



### Cosmetic Display



## Additional Information:

- Most products will have a sequence of numbers and bar code on the back. These numbers are called a **UPC code**.
- When products are merchandised in more than one category in the store it is called "**Cross-Merchandising**". An example of cross-merchandising would be batteries; customers will find batteries in a variety of locations such as toys, sporting goods, cameras, end caps, etc.

 Test your knowledge

1. **It is important for merchandisers to have good basic merchandising skills before starting on your first project.**  
**True**  **False**
2. **A Planogram is a design or “map” of how each item is placed on a shelf or fixture.**  
**True**  **False**
3. **Planograms are the same in every store. You can use the same planogram in every store worked.**  
**True**  **False**
4. **Always have the necessary tools before starting each project.**  
**True**  **False**
5. **Continuously clean up your work area throughout the day and return all cleaning supplies before you leave.**  
**True**  **False**
6. **Parking at the front of the store is acceptable on short work days.**  
**True**  **False**

# TIME MANAGEMENT SKILLS

Everyone has 24 hours each day and 168 hours each week to eat, sleep, work, relax and exercise. Time management, however, does require a merchandiser to have self-discipline and control over the time they spend working in the merchandising field.

The difference between success and failure is not in the amount of time we have but in our utilization of the time available to achieve our results.

Good time management skills allow you, as a merchandiser, to be more productive. In order for a time management process to work, it is important to know what aspects of your job need to be improved. Here are some of the reasons that merchandisers are not as productive as they can be:

- Phone interruptions
- Acting with incomplete information
- Crisis management (putting out fires)
- Unclear communication about the project
- Inadequate training to do the job

## **Phone interruptions**

Telephones can be our biggest asset to communication yet they can also be the biggest cause of not finishing a project on time. Prism's cell phone policy prohibits use of personal cell phones while working at a customer's location on the sales floor. All personal calls need to be handled on breaks or lunch break periods.

## **Complete information**

Make sure that you have all the information necessary at the start of each project. This will cut down on mistakes and will enable merchandisers to complete the project correctly and on time.

If you are asked to work on a project and you do not have the necessary skill level to complete the project correctly, make sure you communicate that to your Team Leader before starting the job. It is your responsibility to make sure that you only take projects that you are qualified for. Prism provides on the job training. Until you demonstrate a level of competency you can expect to work directly with others on a team to build your skills.

We strive to do the job right the first time; however we are aware mistakes will happen. Proper communication and clear directions go along way to avoiding costly errors. If you are not sure how to complete a task, ask before a crisis occurs.

## Time Management Activities and Skills:

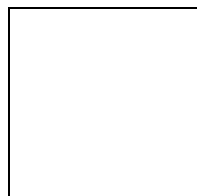
Here are some of the most important time management activities and skills that Prism looks for in professional merchandisers:

- **Prioritizing Skills** – the most important time management skill, it enables merchandisers to handle multiple projects at the same time. Without solid prioritizing skills, you won't have time for what is most important on the project.
- **“Be Prepared”** – the more clear your priorities are each day, the more prepared you are for unpredictable situations that can occur in merchandising on a daily basis.
- **Concentrate on your strengths** – it is important to know your strengths and weaknesses so that you can be assigned to projects that suit your skill level. Complete the most challenging aspect of the project when your energy level is the highest. Take your scheduled breaks and recharge your energy cells.
- **“To Do” Lists** – are extremely important for efficient work. Using “To Do Lists” allows you to remember to carry out all necessary tasks and enables you to complete the most important jobs first.

In order to use your time appropriately, you should always ask the following questions before each project:

- What is the purpose of the job and how will success be measured?
- What are the priorities and deadlines? Be aware of set time limitations.
- What resources are available to each merchandiser if he/she runs into a problem?

If you get answers to these questions before starting each project, you will know how to do your job the right way and within the set goal time!



 Test your knowledge

1. **A merchandiser that manages time wisely will never have a project run over on the time allotted.**  
True                       False
  
2. **Personal cell phone calls are allowed on the sales floor when working if you keep them brief.**  
True                       False
  
3. **Ability to prioritize is the most important time management skill a merchandiser can possess.**  
True                       False
  
4. **“To do” lists are extremely important for efficient work.**  
True                       False
  
5. **To use your time effectively, you should never take start a task you know nothing about.**  
True                       False
  
6. **It is important to have all the necessary information at the start of each project.**  
True                       False



# MERCHANDISING TEAMS

## ***Working Together A Requirement, Not Optional***

As merchandisers, you will work in a variety of projects and locations. Some projects will require you to work by yourself. Many jobs will require two or more merchandisers to work together to successfully complete the reset or project. You are then part of a “merchandising team.”

**Team: A number of people with complementary skills dependant on each other to accomplish a goal. A team has joint accountability for goal accomplishment.**

To accomplish the goal of the project and to satisfy the customer, all members of the team must work together, both with individual effort and with teamwork. Being part of a team that has completed a project successfully – or not so successfully – will allow you to learn more about yourself. You will learn what strengths you have that you weren’t aware of (leadership style and abilities) and you will learn what it takes to work with others as well.

If you are new to merchandising, working in a team will enable you to become better trained in group decision making, have a better understanding of Prism and its work practices and will give you the necessary merchandising skills expected of you.

### **What makes a team “successful”?**

Successful teams have clear objectives, a defined timeframe and are held accountable for results. As merchandisers, you will be given the parameters of each project, what the final product of your work should be, how long you have to accomplish the work and what will happen if you do not complete the work on time and to the customer's expectation.

Not all team members are alike. Some have great ideas, others are good with implementation and details and some will be new to the merchandising profession and will need extra help. Before starting any project, it is important to understand what strengths each member has and who will accomplish what.

### **There are three issues to consider when starting up in a team:**

1. **The first is the “task”** – identifying the problems in getting the job done correctly. Merchandisers should evaluate the project and what will need to be done before starting the work.
2. **The second is the “process”** – how will the team work to make all the steps in the project happen. Having a team plan on who accomplishes the different aspects of each project and how they will accomplish their role will be critical to a successful project.
3. **Last, but not least, someone needs to be the “team leader”** – the role of team leader requires some specific skills; ability to influence and lead the team without direct authority; negotiation skills, task orientation, flexibility and the ability to step in and perform any of the tasks necessary when required. Team leaders help establish ground rules for the project, motivate merchandisers when necessary, secure resources for the team when needed and share responsibility with the team members for the final result.

### **As a merchandiser, you are expected to:**

- Maintain good relationships with your team members
- Offer support and guidance when needed (remember that some team members might not have the same level of skills as you)
- Help determine who does what and when
- Communicate any issues or concerns to the appropriate people
- Play a part in developing a productive and cohesive team

**Most importantly, make sure you celebrate your team’s accomplishment and congratulate yourself on a job well done!**

By working together well, you have helped make the customer happy and hopefully, ensured additional work for your merchandising company!

 Test your knowledge

1. When two or more merchandisers work together, it is called a “team”.

True

False

2. New merchandisers, working as part of a team, will learn new skills including decision making.

True

False

3. Only the team leader is accountable for the goal times.

True

False

4. It is important to pat yourself and your team members on the back after successfully completing a team project.

True

False

5. A “Team” is a group of people with complementary skills who are committed to a common purpose, performance goals and approach for which they hold themselves accountable.

True

False

6. As a team member you are not expected to develop the skills of the others on the team.

True

False

# MERCHANDISING GLOSSARY OF TERMS

## A

<b>Add-on</b>	Additional merchandise that could be added-on to a sale and purchased by the customer
<b>Adjacency</b>	The layout of the store that shows how each planogram or rack is set next to each other

## B

<b>Back Order</b>	An item or order that is presently not in stock but is being reordered and will be available at another time
<b>Back Room</b>	Stockroom or receiving area where reserve product is stored
<b>Back Tag</b>	A printed card used to hang from a peg hook showing that a product is out of stock, the number of facings, SKU and description
<b>Baler</b>	A large cardboard compactor found in the back room which Prism employees should never operate
<b>Bar Code</b>	A group of lines printed on a piece of merchandise or on a label attached to the merchandise
<b>Bar Code Scanners</b>	Reads bar codes. Bar code scanners are generally classified as wands, hand-helds, etc
<b>Base</b>	The bottom flat part of each gondola section
<b>Blitz</b>	A type of merchandising that denotes a rapid roll-out of a product or planogram within a geographic area. A blitz is usually coordinated with an ad date or promotional event
<b>Building a Display</b>	Arranging and putting together merchandise or sample products

## C

<b>Category</b>	Refers to the section in the store; for example Hardware, School Supplies, Cosmetics, etc.
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<b>Clearance Merchandise</b>	Merchandise that the retailer has discontinued and cannot charge back to the manufacturer, usually seasonal, that is sold at a reduced price
<b>Computerized Inventory System</b>	A computer program that tracks inventory and sometimes creates automated replenishment orders
<b>Cross Merchandise</b>	Mixing merchandise from several different departments on one merchandise display; a product merchandised in more than one category
<b>Cut-in</b>	When a new product is introduced, the manufacturer usually likes to “cut-in” the new product into the existing planogram via a revision or update
<b>Cycle</b>	A set period of time where a merchandising visit can be performed

<b>D</b>
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<b>Demonstration</b>	Showing “how to” complete a task. Sometimes called a “demo”
<b>Display</b>	An entire gondola side, counter, category set complete with product and point of purchase materials
<b>Discontinued Item</b>	Items that are no longer being merchandised in the category
<b>Distressed Goods</b>	Items that have been damaged or soiled
<b>Divider</b>	Used along with fencing to separate product on the shelves
<b>Do-It-Yourself-Stores</b>	Usually classified as Home Improvement Stores. Some examples of DIY stores are Home Depot, Menards, Builders Square
<b>Dummy Facings</b>	When the actual product is not in stock, another product with the same dimensions is temporarily faced backwards to ensure correct space is left on shelf

## E

**End Cap** A 3 or 4 foot section located at the end of a gondola used to merchandise seasonal, temporary or promotional product.

## F

**Facing** The number of times a product is merchandised on the shelf or peg hook. Some better selling products have more than one facing.

**Fast-Back Hook** A two prong hook that attaches into the pegboard. Some are designed as two part pegs for easy removal

**Fencing** Acrylic or metal rails secured to the front of the shelf to contain product on the shelf

**Fixture** A display furnishing to hold merchandise

**Fixture Accessory** Shelves, Peg Hooks, etc.

**Free Standing Store** A retail outlet that stands by itself and is not attached to a mall or shopping center

**Front Runner** Plastic strips that attach to the pegs to hold the labels

## G

**Gondola** A type of free-standing shelving unit where products are merchandised

## H

**Hard Lines** Durable merchandise that includes everything from hardware and appliances to Health and Beauty Accessories

**HBC** Abbreviation for "Health and Beauty Care"

I

<b>Identifier Sticker</b>	A sticker adhered to product packaging which communicates that the item is protected against theft or shoplifting
<b>Inventory</b>	Merchandise in-stock and currently available
<b>Inventory Control Clips</b>	Small plastic tabs or rubber donuts placed on a peg to maintain the facing at the front of the peg
<b>IRC</b>	Abbreviation for “Instant Redeemable Coupon” or “Instant Rebate Coupon”
<b>IVR</b>	Interactive voice response system that allows employees to gather store completions in addition to payroll information

J

<b>Just-In-Time (JIT)</b>	A replenishment system that reduces the amount of space a retailer needs for back stock. The product is reordered every time the cashier rings up a sale
<b>J Hook</b>	A hook so called because of its “J” shape. Placed on a shelf used to merchandise impulse products

K

<b>Kiosk</b>	1) A small leased area, booth or cart inside a mall or store. (2) An interactive display or terminal giving access to an Intranet or to the Internet from inside a store for ordering or checking on merchandise
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L

<b>Label</b>	Contains price information for the consumer. Labels are placed in the shelf channels to the left of the product or on the front runners for pegged items
<b>Lead In</b>	The first product a consumer sees from the main aisle. Some planograms have lead in indicators to show which end of the planogram starts near the main aisle.

**Live Label** An EAS label in an active state which will set off the store alarm system

## M

**Manufacturer** Producer of products and merchandise that people buy

**Mapping** The process of determining locations and adjacencies of departments and merchandise inside a store

**Mark Down** A reduction in selling price

**Mass Merchant** A discount retailer that carries a wide variety of merchandise. Example: Target, Wal-Mart

**Merchandising** Presenting products in their best light to generate more sales

**Mystery Shop** Store visit requiring merchandiser anonymity in order to evaluate customer service or gather product information in an unbiased manner; form of market research

## N

**N.A.R.M.S.** Abbreviation for National Association of Retail Marketing Services

## O

**Overhead** The shelf above a section holding overstocks or discontinued items

**Overstock** Additional stock of product that is full to capacity on the shelf or peg

## P

**Peg Board** The backing on many fixtures where hooks are inserted to display product.

**Pegged Merchandise** Product that is merchandised on peg hooks



<b>Peg Hook</b>	Metal or plastic hooks that fit into the pegboard to hold product.
<b>Physical Inventory</b>	Physically counting the individual items in stock at a particular date and time
<b>Planogram</b>	A schematic drawing of fixtures that illustrate product placement. Picture or layout plan describing where merchandise is to be placed on the fixtures. Also known as a POG
<b>POG</b>	Abbreviation for Planogram.
<b>POP</b>	Abbreviation for “Point of Purchase” material. Printed material that draws attention to the product on the shelf
<b>POS</b>	Abbreviation for “Point of Sale” – Term normally used to describe cash register systems that record transactions or the area of “checkout” in a retail store
<b>Preferred Product Location</b>	Shelves that are located between hip level and eye level
<b>Private Label Brand</b>	A store’s in-house brand
<b>Profile</b>	The height of the gondola. Also, the amount of distance from one shelf to another shelf

Q

R

<b>Reset</b>	A major change or revision to an existing planogram, a section, department or an entire store
<b>Reserve Stock</b>	Merchandise that is stored in an area inaccessible by customers
<b>Retailer</b>	An individual or firm that sells goods and services directly to the consumer
<b>Riser</b>	Shelves above the shoppable portion of a gondola

**Rotate Stock** Stock new merchandise behind old merchandise when filling displays. Can also mean replacing old stock with new stock

**Rounder** Round apparel rack fixture

## S

**Schematic** Line-art drawing of the planogram, showing how many shelves or peg hooks to use.

**Seasonal Merchandise** Products that are in demand at a certain time of year, such as Christmas or Back-to-School

**Service Recovery** Dealing effectively with customer complaints, problems and dissatisfaction.

**Shelf Channel** The indented front of the shelf where labels or plastic label strip holders are placed

**Shelf Extender** A 7" metal extender used to merchandise and compare a name brand product to a private label product

**Shelf Label** Label showing item placement on the shelf and description of product size, price, UPC code, ordering code, movement and date tag was printed

**Shelf Talker** A small sign that points out sale, product features or price

**SKU** Abbreviation for "Stock Keeping Unit". Some SKU's have more than one facing. Each SKU is associated with a different product on a planogram (POG) and is a number assigned by the retailer to keep track of the type, color and size of a product

**Sky Hook Peg** Fastback metal peg with label holder attached. Front-runner is not used

**Soft lines** Clothing merchandise including accessories

**Specialty Retailer** A retail outlet that concentrates its merchandising efforts in a particular category of items within that category. Example: ToysRUs, Ace Hardware

**Super Store** A larger than average supermarket or discounter.  
Example: Target Superstore, Kroger, Jewel

**Surge** Expanded or increased need for a reset due to a new item initiative

**T**

**Telzon** Hand-held tracking unit used to order and track store inventory

**T-Stands** Basic apparel fixtures with posts topped by cross bars

**U**

**Universal Product Code** Standard for encoding a set of lines and spaces that can be scanned and interpreted into numbers to identify a product. A sequence of numbers and bar code on the back of each product

**UOM** Abbreviation for "Unit of Measure"

**UPC** Abbreviation for "Universal Product Code"

**V**

**Vendor** Person or company providing merchandise or service to a retail store

**Visual Merchandising** Arranging items for display. Also known as "Visual Presentation"

**W**

**Wing Display** A display that flanks an end cap

**X**

**Y**

**Z**