



Merchandising Essentials

Self-Directed
Study Guide

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How To Use This Workbook

The purpose of this workbook series is to provide you with knowledge, skill and ability on a wide range of subjects related to your produce department. To ensure success you will want to identify who your manager or trainer will be for this program.

Manager Name: _____ Date: _____

If you have more than one manager or trainer, list them below. Any of these individuals are capable of signing-off on your work. Refer to the individual directly responsible for your training for more information.



You will need to complete all of the exercises and work activities, and have your manager sign and date the designated areas of the workbook. This way, you and your manager will know that you have successfully completed all of the learning exercises, and have achieved the desired level of understanding, skill and ability to execute tasks needed to do your job well.

What You Will Learn



This course is geared toward providing you with the essential skills to plan, build and maintain produce displays. After completing the readings and exercises in this workbook, you will be able to do the following.

Create an effective plan for building a display

Whether it is your manager or your corporate office that dictates the display plan, the principle is the same – know your plan and then work your plan.



Build merchandise displays that sell

The goal of all displays is to grab our customers' attention. You will learn the concepts and techniques required to create displays under the guidance of your training coach.

Use signage to increase sales

Even the most colorful and engaging display will not be successful without effective use of signage. You will gain valuable practice creating and placing signs onto displays.

What You Will Learn



Ensure display quality through proper maintenance

A display is never finished until it is time to take it down. You will learn to recognize when and how to rotate, restock, fix, cull and clean displays once they have been built.



Increase sales through cross merchandising

Cross merchandising is a great way to increase overall sales. This technique allows you to draw attention to items that complement the main item on your display.



Maximize the impact you have on your shift

On every shift you make a direct impact on your produce department and your store as the whole – either positive or negative. You will learn a set of guidelines that will help you make the most of each and every shift.

The Produce Department Makes a Difference

One of the challenges that team members in the produce department face is effectively merchandising or displaying the wide range of items sold within the produce department.

There are many variables that come into play in the produce department that make a big difference:

- Quality
- Appearance
- Cleanliness
- Price
- Seasonal availability

As a produce clerk, you influence your customers' shopping experience and, ultimately, influence their decision to return and shop at your store again. By creating eye-appealing displays, you have an opportunity to help customers in their decision-making, and that could mean increased sales.

Consumers are selective about where they shop because of fresh produce!

Did you know that most of your customers choose to shop at their particular store because of the quality and freshness of the produce?

According to a recent study:

- 57% of the consumers surveyed said that they have changed supermarkets based on liking the produce department in one store better than another.
- 60% of these switching consumers say that quality issues were the main reason for the switch.

The produce department is one of the few departments in a grocery store where customers are won or lost.

What Is Merchandising

Great displays are not created on a whim. It takes a lot of knowledge and practice to become an expert. There are three main phases for managing the process of merchandise displays:



Planning



Building



Maintaining



Stage One: Planning

Whether it is your manager or your corporate office that dictates the plan, the principle is the same – know your plan and then work your plan.

Key Steps to Developing an Effective Plan

Step One:

Make sure you are clear on the primary goal of the display.

For example, is the primary goal to sell more strawberries than last week, or is the goal to cross merchandise the sale of strawberries with another product, or is it to increase the sales of both?

HELPFUL HINT

Refer to any merchandising guides your manager has available or think back on previous successful displays you have seen or helped your manager to build.

Once you have a solid idea of what you want to build, put the idea down on paper and include a list of the different items you will need to build the display.

Step Two:

Visualize what you are going to build, including the produce items and signage you will use in the display.

Remember, all design ideas should serve to achieve the primary goal you set for the display in Step One.

Stage One: Planning



Step Three:

Consult with your manager to verify that the display is within corporate guidelines. It is important that each display meets the company standards and branding themes.



Step Four:

Check your list of items you created earlier and make sure you have everything you need on hand. This critical final step will save time in the long run.

Once you've verified you have all of the items you will need, the next step is to get to work building the display.



REMAIN OPEN-MINDED

Even though planning is a critical key to building effective displays, it is important to stay open to change as needed.

Don't be afraid to suggest a change in direction if some aspect of your plan can't be implemented in the precise way you envisioned it. Some of the best finished displays ended up being different than the original plans.



Stage One: Planning

Interview Your Manager

In order to gain a general understanding of how each of the planning stages function in your company and department, interview your manager by asking the following questions?

Q: Who is responsible for creating display plans in our department?

Q: Do we have to seek approval on a plan prior to building it? If so, who approves it?

Q: Are many plans sent to us from a regional or corporate office, or is this mostly done by our store team? Are there any exceptions to this process? If so, what?

Stage One: Planning



On-the-Job Learning Exercise: Display Planning

Using the form on the following page, work with your manager to plan a new produce display. This planning process incorporates the entire planning cycle, starting with the vision of what the display will look like.

You may not be familiar with some of the display building techniques listed just yet, but that is okay. Your focus for this exercise is to become familiar with the thinking that goes into building a great display.



NOTE

If your store exclusively uses corporate plan-o-grams or has displays created and sent to the department, then just review the details of these existing plans with your manager to fulfill this exercise. Your company creates these plan-o-grams based on market research, customer feedback and overall company strategy, so it is vital that you and your team learn how to work with this documentation and follow it carefully.





Stage One: Planning

Display Planning Checklist

Primary Goal(s) of the Display:

Visualize the End Result

Type of Display

- | | |
|--|---|
| <input type="checkbox"/> Freestanding | <input type="checkbox"/> End Unit |
| <input type="checkbox"/> Existing Row | <input type="checkbox"/> Existing Fixture |
| <input type="checkbox"/> Other/Special | |

Technique(s) to Use

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Original Boxes | <input type="checkbox"/> High Volume |
| <input type="checkbox"/> Hand-stacked | <input type="checkbox"/> Dummying |
| <input type="checkbox"/> Controlled | |
| <input type="checkbox"/> Other (specify): | |

Supply List (inventory and estimated counts, display materials, sign materials, tools, etc.)

- | | |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Requirements Does the display meet your corporate/owners guidelines?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

Manager/Training Coach: _____ Date: _____

Stage Two: Building

Once you have a plan in place, the next step is to execute that plan.

This starts with understanding what captures our customers' visual interest and attention.

There are five keys to creating visual excitement in displays, like the ones pictured here.



- **Height**
- **Depth**
- **Color**
- **Shape**
- **Size**



The more visual excitement you put into a display, the better chance it will have of capturing your customers attention.

Your manager will specify the techniques you should use in different situations.

If you are new to display building you can usually build alongside other clerks or your manager until you're comfortable on your own. Don't be afraid to ask for their advice. Let's take a look at some basic techniques.

Stage Two: Building



Important Techniques For You to Master

Original Boxes

Big waterfall displays with colorful original boxes and packaging.



Hand-stacking

Carefully placed items that allow you to ensure that the best side of each item is always facing the customer.



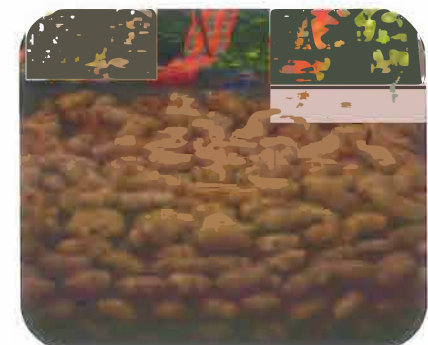
Controlled Style

Used for smaller or specialty product displays and typically requires frequent replenishment during busier times of the week.



High-volume Style

Used for higher-volume product. This style takes more time to initially set up, but requires less restocking.



Stage Two: Building



Dummying

Using different materials under the produce items themselves to make the display look fuller and more attractive. Dummying gives you the opportunity to display less product without the display looking empty or picked over.



Peripheral Items

A technique of pairing seasonal or unusual items with faster moving, popular items. For example, if honeydew melons are on sale and you have a big display, you could place items like specialty melons and fresh pineapples with that display. Specialty melons and pineapple are peripheral items.

Stage Two: Building



Interview Your Manager

In order to gain a general understanding of how display building operates in your company or department, interview your manager by asking the following questions.

Q: When going from the planning stage to the building stage, what process is used to determine the quality and/or accuracy of a completed display?

Q: What team members are responsible for making signs? How much of our signage is sent to us from our corporate office? When making our own signs, is there a set of rules we follow?

Now that you have a better understanding of how displays are planned, and the standard techniques used to display produce, it is time for you to put this knowledge to work with hands-on practice.



Stage Two: Building



On-the-Job Learning Exercises: Display Building

Your goal is to build at least three displays, each using a different technique described earlier (controlled, high volume, original boxes, etc.). Have your manager assign three display builds for you to complete.

Display Build One

Date Assigned: _____ Date completed: _____

Product(s) Being Displayed Include any important notes on handling these items.

Display Planning Use company documentation or the display planning sheet provided.

Describe the display building techniques(s) to be used and why.

What was the most important thing you learned about building displays based on this experience?

Sign-off The completed practice display met the quality standards of our company.

Manager/Training Coach: _____ Date: _____

Stage Two: Building



On-the-Job Learning Exercises: Display Building

Continue developing your skills by building your second display.

Display Build Two

Date Assigned: _____ Date completed: _____

Product(s) Being Displayed Include any important notes on handling these items.

Display Planning Use company documentation or the display planning sheet provided.

Describe the display building technique(s) to be used and why.

What was the most important thing you learned about building displays based on this experience?

Sign-off The completed practice display met the quality standards of our company.

Manager/Training Coach: _____ Date: _____



Stage Two: Building



On-the-Job Learning Exercises: Display Building

Continue developing your skills by building your third display.

Display Build Three

Date Assigned: _____ Date completed: _____

Product(s) Being Displayed Include any important notes on handling these items.

Display Planning Use company documentation or the display planning sheet provided.

Describe the display building technique(s) to be used and why.

What was the most important thing you learned about building displays based on this experience?

Sign-off The completed practice display met the quality standards of our company.

Manager/Training Coach: _____ Date: _____

Effective Signage



A colorful and well-designed display will sell product, but there is still something missing – signage. Great signs help to sell produce when you are not there and are an integral part of every display.

Effective Signs Have the Following Characteristics:

Customer education

Good signs educate customers on the benefits of the product being displayed by including information such as nutrition, seasonality and the origin of the product.



Provides information on how the item is sold

Good signage should clearly state the price and how the item is sold – by the piece, the pound, the package, etc.

Provide information about product usage

This includes preparation of the product as well as recipe ideas. This information will help the customer see the value in the items on display, and may convince them to try new products.

Effective Signage

Describes flavor profiles and characteristics

Communicate the flavor! Use descriptive words to communicate the taste or unique flavor of different produce items.



Creates a professional image for the store

Make sure all text can be read easily, and that signs are not worn or damaged. The same quality and design principles that apply to other aspects of the display should also apply to the sign.

Finally, take the time to verify the accuracy, the position, and visual appeal of the sign before putting it on the display.

Always ask the following questions:

- Are all words spelled correctly?
- Is the pricing correct?
- Is it positioned correctly?
- Is the sign stable?
- Is the sign clean?

Effective Signage



Effective Signage Exercise One

Take a close look at the following signage:



Q: What quality issues do you notice?

Q: What could be done right away to fix this sign, and what do you feel could be done in the future to prevent this from re-occurring?

Effective Signage

Effective Signage Exercise Two

Take a close look at the following signage:



Q: What is your reaction to this sign? Does it project a professional image? Explain your thoughts.

Q: What would you suggest be done differently? How might your suggestions improve the success of this Manager's Special?

Using Complementary Colors

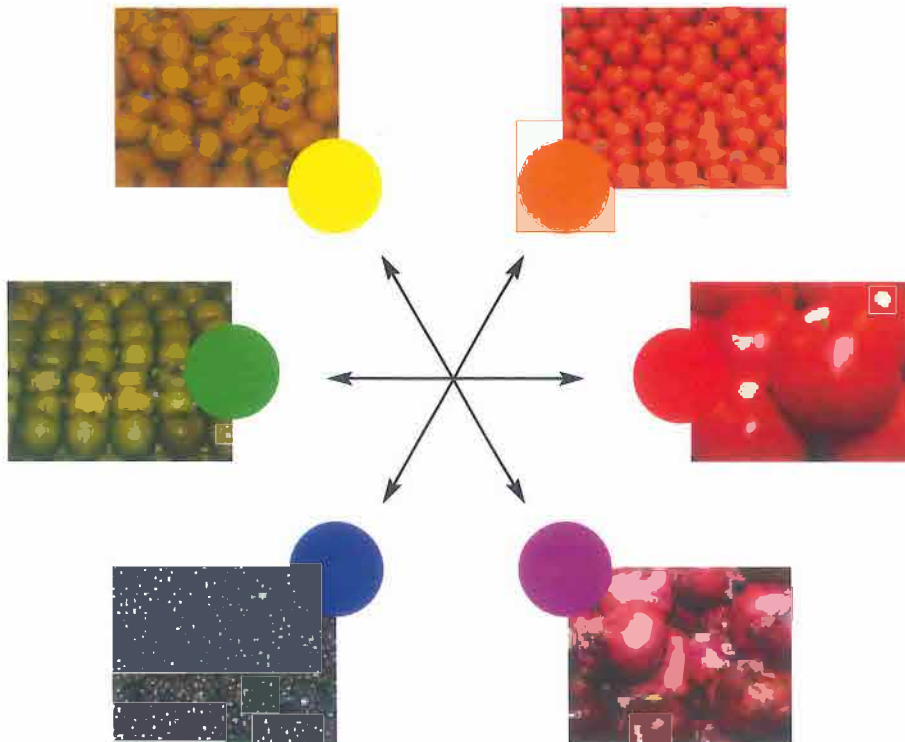


Why does the display on the left look better than the right? The reason is the use of complementary colors.



What are complementary colors?

Complementary colors sit opposite each other on the color wheel. Red and green are the most common examples of complementary colors in produce displays. Because they are opposites, they tend to look especially lively and noticeable when used together.



Stage Three: Maintaining

So – you’ve finished building a top-notch display

Your manager has praised your use of vibrant color, expert facing of each item, and the display has already drawn the attention of several customers as well.

So, what happens next?

The truth is that a display is never finished until it is time to take it down completely.

Think About It

The more successful your display is, the more attention it will draw, the more customers will buy, and the more quickly your display will be emptied. So the better your display, the less finished you are. After the display is built, your next focus should be on frequently stopping back and doing any necessary clean-up and restocking.

A few things to consider include:

- Stock moves rapidly
- Stock does not move at all
- Different products go on sale at different times
- Signs become damaged
- Display gets dirty
- Product becomes bruised through customer handling
- Products fall on the floor, creating a slip and fall hazard

Fine tuning and maintaining your display are things you will need to do all of the time.

Stage Three: Maintaining



Keys to Maintaining Your Displays

Restocking

Although some re-stocking is to be expected, if you find that you are constantly re-stocking, you might need to consider making your display larger.



Quick Fixes

If you notice an issue with your display that can be fixed quickly, try to fix the problem immediately. For example, if a display does not have a roll of bags nearby that is an easy and important fix to make.



Culling and Re-facing

Culling or removing damaged and overripe product is extremely important because it keeps the display looking fresh and clean, and assures customers of your commitment to quality. The same holds true with re-facing. Customers handle produce a lot, so it is important to re-face items so the best side is facing the customer.



Stage Three: Maintaining



Checking stock room level

As you begin to sell the items used in your display, keep a close eye on stock levels in the store room. If you're starting to sell out of a certain item, reduce the size of the display and inform your manager immediately.

Keep it clean

The importance of a clean display may seem obvious, but it requires diligence to keep cleanliness at the top of your mind. If you or your team members allow a display to become dirty, the customer's eyes will focus on the problem instead of your produce. The same dust build-up that you walk past in a hurry is often noticed immediately by the customer. Several times a shift, walk through the produce department area with fresh eyes, looking for any missed cleaning details.

Common Cleaning Tips

- Make sure that all holding containers, such as baskets, bins, cases, or coolers are clean at all times.
- Keep the surrounding floors clean and uncluttered. Don't leave cases of product, tools or other merchandising supplies lying around.
- Make sure that all signs remain clean, neat and crisp.
- Make sure that the base of the display (or whatever is keeping the display stable) is neat and clean and secure.
- Keep yourself clean too. Remember, YOU are part of your display.

To gain some job knowledge about the importance of cleanliness, it is time to conduct a cleanliness audit on your produce area of the store.

Stage Three: Maintaining



Department Cleanliness Audit

Go through all of the main areas of the department and conduct your own cleanliness inspection.

	Meets Standard	Not Acceptable	Quality Indicators
FLOORING Notes:	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • All surfaces are spotless. • No loose or fallen product is evident on floors or along baseboards or floor moldings. • No sticky, damp or wet areas. • Traffic areas are clear of any clutter.
DISPLAY CASES Notes:	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • All display cases and hardware are clean and free of dust including display bases, backsplash mirrors, side dividers, and shelves are clean. • Look closely underneath the produce at the bottom of the display bins. • Is it evident that all produce was removed to thoroughly clean the entire fixture?
BAGS AND ROLL DISPENSERS Notes:	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • All roll dispensers are filled. • Bags are neat and tightly rolled. • No dispensers are misplaced, broken or dirty.
SIGNAGE Notes:	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • All signs are free of dust and dirt. • In good condition; no tears, falling or missing numbers or letters. • Signage is stable. • Positioning of signage is orderly and placement is aligned correctly with each product.
BACK STORAGE AREAS Notes:	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • All coolers are clean and sanitized. • Shelves are dust free and dry. • Nothing is sitting on the floor or is stored at improper temperatures.



Stage Three: Maintaining



On-the-Job Learning Exercise: Display Cleanliness

Your next task in this exercise is to fix some of the areas of opportunity you identified during your cleanliness audit.

Step One:

Have your manager go back through the department with you to check the accuracy of your cleanliness audit, as there may be things that he or she notices that you did not.

Step Two:

Ask your manager to assign you cleaning tasks from specific areas on your list that will best suit the current department needs. You might also notice cleaning opportunities to suggest to your manager as well.

Stage Three: Maintaining



Department Cleanliness Audit Questions

Q: Which area(s) of the department seemed to be the cleanest in your opinion?

Q: Which areas, if any, did you notice some opportunities for improvement? Be specific and detailed in your observations.

Q: How might some of the issues you noticed, if any, present a risk of impacting the customer's perception of our store?

Q: Did any of the issues you noticed pose a safety hazard or risk? Be specific and detailed in your observations.

Stage Three: Maintaining

Interview Your Manager

In order to gain a general understanding of how the display maintenance function works in your company/department, interview your manager by asking the following questions.

Q: What are our biggest overall maintenance challenges? What can I do to help overcome these challenges?

Q: How does product seasonality impact our attention to display care and maintenance?

Q: On a scale from 1 to 10, with 10 being perfect, how do you think our customers would rate the condition of our displays and the cleanliness of our department? If we are not a 9 or a 10, what do you think we could do to take us to that point in the customer's eyes?

Stage Three: Maintaining



Real World Example: What would you do?

Read the following real life example of what happens in the fresh produce department and answer the questions below.

Franklin, a team member in your produce department, recently created a colorful and stunning stand-alone display near the entrance of the produce area. This display features three varieties of apples: McIntosh, Golden Delicious and Red Delicious. There are four additional varieties of apples being displayed in the regular apple display case near the back of the department (Fuji, Gala, Granny Smith and Honeycrisp). Of these varieties, the Honeycrisp is nearing the end of its season and inventory is low, Fuji and Gala have gone up in price lately and are slower moving, but Granny Smiths are on sale.



Franklin

Halfway through the day, *Phillip*, a newer member of your produce team, informs you that he has seen several customers approach the new apple display with a confused or aggravated look on their faces, and in fact one turned right around and left.



Phillip

Q: What might be causing some customers to react poorly to Franklin’s new display?

Q: What advice would you give the new team member Phillip?

Q: What changes would you consider making?

Stage Three: Maintaining

Display Maintenance Exercise One

For this exercise you are to determine whether or not the product display requires maintenance. Then you are to answer the questions that follow:

VOTE

Is this display:

- ☐ Good for now
- ☐ Needs attention



Q: What did you specifically notice about this display to support your answer?

Q: If you decided that this display was good for now, identify the build technique that was used to create this display.

Q: If you decided that this display required attention, what would you do to prevent this from occurring quite as often in the future?

Stage Three: Maintaining

Display Maintenance Exercise Two



VOTE

Is this display:

- ☐ Good for now
- ☐ Needs attention

Q: What did you specifically notice about this display to support your answer?

Q: If you decided that this display was good for now, identify the build technique that was used to create this display.

Q: If you decided that this display required attention, what would you do to help to prevent this from occurring quite as often in the future?

Stage Three: Maintaining

Display Maintenance Exercise Three

VOTE

Is this display:

- ☐ Good for now
- ☐ Needs attention



Q: What did you specifically notice about this display to support your answer?

Q: If you decided that this display was good for now, identify the display build technique used to create this display.

Q: If you decided that this display required attention, what would you do to help to prevent this from occurring quite as often in the future?

Stage Three: Maintaining



On-the-Job Learning Exercise: Display Maintenance

Your task is to make a sweep through the produce department and rate at least five different produce displays on a 1 to 5 scale, with 5 meaning the display is in perfect condition (requiring no maintenance) and 1 meaning the display is in poor condition (requiring a lot of maintenance). Once you finished your assessments, your last step is to complete the maintenance (or as much of the maintenance as your manager or training coach deems possible).



NOTE
Ask your manager or training coach to determine how many displays you will need to rate based on department size and other factors.

Product on Display	Poor Condition	Maintenance Required			Perfect Condition
#1	1	2	3	4	5

Explain what tasks, if any, are required for this display.

#2	1	2	3	4	5
----	---	---	---	---	---

Explain what tasks, if any, are required for this display.



Stage Three: Maintaining



On-the-Job Learning Exercise: Display Maintenance

(continued)

Product on Display	Poor Condition	Maintenance Required	Perfect Condition		
#3	1	2	3	4	5

Explain what tasks, if any, are required for this display.

#4	1	2	3	4	5
----	---	---	---	---	---

Explain what tasks, if any, are required for this display.

#5	1	2	3	4	5
----	---	---	---	---	---

Explain what tasks, if any, are required for this display.

Sign-off The completed practice display met the quality standards of our company.

Manager/Training Coach: _____ Date: _____

Cross Merchandising



What is Cross Merchandising?

Cross merchandising is displaying items together to encourage sales of the combination of the items. The purpose of cross merchandising is to draw attention to a secondary item which serves to increase interest toward the primary item on display and increase sales. For example, you can cross merchandise your apple displays with products required to bake an apple pie.

Deciding which items to Cross Merchandise

Use your own knowledge – you can use your own personal experience. Just try putting together items that you (or others you know) usually prepare together. You can also talk to your manager if you need other ideas or to confirm your ideas about which items might be good for cross promotion.

Consider the season

Use the time of the year when determining which items to cross merchandise. Does the display make sense for the season or an upcoming holiday? For example, you won't have the excitement for caramel and apples in the spring that you would have in the fall.



Visual appeal

Make sure the items catch customers attention with color, style, themes, size, etc. Customers attracted to your displays will shop longer, which increases the rate of impulse purchases.



Cross Merchandising

Secondary display locations

Know the limitations of cross merchandising. Secondary displays can be a great sales tool, but if not executed right, they can clog an aisle or make it difficult for your customers to shop.



Know your store

Large stores typically offer more cross merchandised products than smaller grocers. It is critical to know your store, because each business will have a unique plan for meeting the needs of customers.



Communication is important

Items from other departments are often perfect for cross merchandising. Be sure to ask the other department Managers if it's okay to use items from their department before you use them as part of your display. Everybody needs to know the location of their inventory.



Cross Merchandising



Below is a matching exercise for you to explore some of the basic possibilities of pairing products together. Cross merchandising efforts are focused on the produce department more than any other in the store. In part, this is because there is usually more room for free-floating displays, but is also due to the versatility of fresh fruits and vegetables.

There is not always one right answer, and in fact it is quite possible for you to have two or even three answers associated with the same item. Cross merchandising is a combination of creativity, an understanding of your products and how your customers plan to use them. Discuss your answers with your manager or training coach.

1. Tomatoes	_____	A. Whipped Topping
2. Potatoes	_____	B. Chips and Salsa
3. Lemons	_____	C. Ranch Dressing
4. Strawberries	_____	D. Cocktail Shrimp
5. Peaches	_____	E. Cereal
6. Apples	_____	F. Cobbler Mix
7. Avocados	_____	G. Basil
8. Bananas	_____	H. Zester
9. Carrots	_____	I. Beer
10. Limes	_____	J. Cornbread Stuffing Mix
11. Bagged Salad	_____	K. Caramel Dip
		L. Chives



Cross Merchandising



On-the-Job Learning Exercise: Cross Merchandising

Your task is to identify as many cross merchandising programs currently in place in your produce department. Your training coach may opt to have you locate produce being cross merchandised throughout the rest of the store too. When you are finished, take your list to your training coach for review.

Main Display Item	Paired Product(s)

Questions

Q: What seasonal cross merchandising displays did you observe?

Q: What non-produce items (if any) were cross merchandised with produce items?

Q: What produce items (if any) were on display in other departments (aisles, end units, etc.) throughout the store?

Your Shift Impact



Maintain a Customer-first Focus

Pay close attention to the visual appeal and presentation of each item you stock. If you wouldn't buy it, the customers probably won't either.

Knowledge of your produce items is one of the best ways to deliver great customer service. Developing a strong knowledge of each item in your produce department will help you be ready to step in with a good suggestion whenever you spot a customer who needs your help

Replenish, rotate and cull

The best way to give your customers what they want is to be sure your produce is as fresh as possible. And you can't create happy customers if you don't have what they want to buy, so continuously replenish your displays and bins with the best quality product. An empty display means an unhappy customer and a lost sale.



HELPFUL HINT

The best way to keep display bins looking great is to continuously monitor them throughout your shift. Be sure to learn the peak shopping time for your store and to prepare for it, and replenish during and after it.

Your Shift Impact



Keep your priorities straight

Giving your customers your best means paying attention to them. It may seem at times like your focus is on your produce, but displays are always secondary to your customers. As you are working on a display, be on the look out for any customer who looks like they might need assistance. It's always best to stop what you are doing and ask if you can help them.

Keys to increasing your product knowledge

- *Develop your understanding of product seasonality.* This will help you to merchandise the right products at the right time.
- *Know where all products are located.* This way, you can walk the customer to the exact location of the item. Avoid pointing or describing where an item is located.
- If you feel comfortable sharing recipes, *look for opportunities to share recipes that involve produce items with your customers.* Most customers will appreciate the extra attention you give them.
- When possible, *share information about an item with your customers.* You could say something like – Did you know tomatoes are not only fat free, but they are also a good source of vitamin A, vitamin C? And they are wonderful paired with some fresh basil?

Your Shift Impact: Exercises

Think through each of these scenarios and determine what ideas and courses of action are best. Be prepared to discuss your answers with your coach.

- 1: In a team meeting, your manager opened up the floor to talk about autumn displays, especially cross merchandising ideas. We are expecting a big shipment of pumpkins. What ideas do you have for cross merchandising?

- 2: Only one hour ago, you re-stocked a small display of romaine that is on special. As you walk by, you notice that it has already been picked over.

- 3: Jim works in the seafood department of your store. Per the general manager's direction, co-workers from the seafood department are ultimately responsible for ensuring that the lemons being cross merchandised there are replenished. In the break room, Jim remarks to you – I told them I was too busy to do this, and sure enough, just yesterday I walked by and noticed that the lemon display was in need of attention. What ideas and solutions might you suggest to your manager to lend Jim some much needed support as a team member?



Your Shift Impact

Your Shift Impact: Exercises (continued)

HINT

There are many potential answers, so brainstorm a list of ideas.

- 4: Early in the month, a large display of avocados was a huge success, both the individual and bagged avocados. But lately you have had to cull a lot more avocados from the display than you did before. What might be causing this, and what solutions would you consider?

- 5: At a recent team meeting, your manager has challenged everyone to focus on reducing the current level of shrink (loss) of product, especially by focusing on rotation. This morning, you noticed a fellow team member placing bananas of poor quality on top of the high volume banana display. How might this team members decision actually increase shrink instead of help to reduce it?

CONGRATULATIONS!

You have finished this self-directed learning program. It is time to take a short knowledge test. Afterwards, make sure your manager signed all your activities.

Knowledge Test



Circle or check the best answer for each of the following questions.
When you are done, ask your manager or training coach to grade your answers.

- 1:** Once your display is up, you can consider it finished.
☐ TRUE ☐ FALSE
- 2:** Which of the following is a FALSE statement about planning a display?
A. Make sure you are clear on the primary goal of the display.
B. Visualize what you want to build.
C. Verify you have enough necessary items on hand before you start building.
D. Make sure to talk to your manager after you've built the display to confirm it is in line with corporate standards.
- 3:** Sometimes you may need to adjust your plans in the middle of the building process.
☐ TRUE ☐ FALSE
- 4:** As long as you have a lot of color in your display, the types of colors you use doesn't matter.
☐ TRUE ☐ FALSE
- 5:** Which of the following is a TRUE statement?
A. Most customers will hurry through the produce department, so cleanliness is not as critical as it is in other departments.
B. Your manager will typically specify the type of display technique you should use.
C. It's best to keep your displays focused on one item, so do not use peripheral items in your produce displays.
D. Signs should only be used in displays if you have extra time to work on them.
- 6:** It only takes one bad impression to convince a customer to shop elsewhere next time.
☐ TRUE ☐ FALSE
- 7:** When you are refreshing a display, you should rotate the newer stock ____ the older stock.
A. behind
B. in front of

Knowledge Test

- 8:** If you are checking back on a display and notice a major problem, you should _____.
- A. Take down the display and start building a new one.
 - B. Watch how the next group of customers reacts to the display to help determine how to fix the display.
 - C. Do your best to fix the display and then inform your manager.
 - D. Keep the display as well-maintained as possible until you and your manager can agree on a solution.
- 9:** Which of the following is an example of cross merchandising?
- A. Displaying bananas next to lettuce.
 - B. Displaying green peppers in a different area of the department from where they are normally located.
 - C. Displaying the ingredients needed to make an apple pie next to an apple display.
 - D. Posting signage that tells the customer extra information about the items on display.
- 10:** You are building a display of bananas and find that some of the bananas you are about to put on display are of relatively poor quality. What should you do?
- A. Put the poor quality bananas in the back of the display.
 - B. Don't display the poor quality bananas.
 - C. Mix the poor quality bananas in with the high quality bananas so they blend in.
 - D. Put the poor quality bananas in the front of the display so they are purchased first.
- 11:** Which of the following is a FALSE statement about cross merchandising?
- A. Effective cross merchandising requires strong product knowledge.
 - B. Cross-merchandised items should be visually appealing.
 - C. If you used items from another department, you just need to let that department's manager know what you took at the end of the shift.
 - D. Consider the season or time of the year when determining which items to cross merchandise.
- 12:** The ultimate goal of everything we do is to please our customers.
- ☐ TRUE ☐ FALSE

YOUR SCORE

11+ correct:
Congratulations! You are on your way to becoming a produce expert.

10 correct: Excellent

9 correct: Good job

8 or less correct:
You might need to pay closer attention.

Activity Completion and Sign-off



The purpose of the module was to provide you with hands-on experience with produce display merchandising. Specifically, you should feel confident in your ability to plan, create, maintain and cross merchandise produce items in your store.

Activities to Complete

On-The-Job Learning Exercises	Trainer Initials	Trainee Initials
Display Planning (page 9)		
Display Building (page 14)		
Department Cleanliness Audit (page 24)		
Display Cleanliness (page 25)		
Display Maintenance (page 32)		
Cross Merchandising (page 37)		
Manager Interviews	Trainer Initials	Trainee Initials
Display Planning (page 8)		
Display Building (page 13)		
Display Maintenance (page 27)		

Trainee Signature

Manager Signature

Date

Date



Future Learning and Development Plan

Naturally, there are bound to be some tasks related to merchandising that you are more confident in than others, as learning is a continual process based on experience and practice. Your manager will provide you with specific development goals based on your performance throughout this program. You and your manager will take these ideas and create a development plan together (see next page).

Trainee Signature

Manager Signature

Date

Date



Name: _____ Date: _____

Development Plan



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