



**CAREER CLUSTER**  
Marketing

**CAREER PATHWAY**  
Merchandising

**INSTRUCTIONAL AREA**  
Customer Relations

## **RETAIL MERCHANDISING SERIES EVENT**

### **PARTICIPANT INSTRUCTIONS**

#### **PROCEDURES**

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 10 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.
2. You will have up to 10 minutes to role-play your situation with a judge (you may have more than one judge).
3. You will be evaluated on how well you meet the performance indicators of this event.
4. Turn in all your notes and event materials when you have completed the role-play.

#### **PERFORMANCE INDICATORS**

1. Demonstrate a customer-service mindset
2. Handle difficult customers
3. Interpret business policies to customers
4. Handle customer complaints
5. Explain the nature of positive customer relations

## EVENT SITUATION

You are the **Retail Sales Manager** for **Phones & More**, a small retail business which specializes in the sales of cellular phones. You are to address an **Angry Customer's** (judge's) complaint.

Phones & More is a new, independently-owned retail specialty store. Phones & More carries a large variety of mobile/wireless devices and accessories which are compatible with many different cell phone service providers. Your sales associates are all well trained on each device by sales representatives from each manufacturer. Phones & More is located in a strip mall, located adjacent to a big-box electronics store which also happens to carry a limited number of similar mobile devices.

Phones & More has the following return policy posted at each Point of Sale (POS) system:

*Customers may return or exchange wireless devices and accessories within 14 days of purchase. A restocking fee of \$35 applies to any return or exchange of a wireless device.*

Wireless devices purchased by your store for resale may not be returned to the manufacturers unless they have a factory defect. The store owner has stated that the Sales Manager (participant) is the only person who is allowed to make an exception to the return policy, but that exceptions must be kept to a minimum to keep store profitability up. The store owner has also stated that cash refunds should only be given in cases where no other suitable course of action can be taken to correct the situation.

A sales associate has asked you to come to the POS station to deal with an Angry Customer (judge) who wants to return a smartphone which he/she purchased 20 days ago from your store. The sales associate tells you that the customer (judge) was out of town on business, and was unable to return the smartphone within the given time frame. The sales associate also informs you that the customer (judge) is very dissatisfied with the phone quality, but states that the phone is not defective. The customer (judge) is very unhappy and has asked to speak with a manager (participant).

The discussion with the customer (judge) will take place at one of the POS Stations on the sales floor. The customer (judge) will begin the role-play by greeting you and asking for clarification on the store's return policy.

At the appropriate time, the customer (judge) will conclude the role-play by thanking you for your time.

## JUDGE'S INSTRUCTIONS

### DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. Performance Indicators
3. Event Situation
4. Judge Role-play Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

### JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of an **Angry Customer** at **Phones & More**. The **Retail Sales Manager** (participant) must meet with you to answer your complaint about the store's return policy.

Phones & More is a new, independently-owned retail specialty store. Phones & More carries a large variety of mobile/wireless devices and accessories which are compatible with many different cell phone service providers. The sales associates are all well trained on each device by sales representatives from each manufacturer. Phones & More is located in a strip mall, located adjacent to a big-box electronics store which also happens to carry a limited number of similar mobile devices.

Phones & More has the following return policy posted at each Point of Sale (POS) system:

*Customers may return or exchange wireless devices and accessories purchased within 14 days of purchase. A restocking fee of \$35 applies to any return or exchange of a wireless device.*

Wireless devices purchased by the Phones & More store for resale may not be returned to the manufacturers unless they have a factory defect. The store owner has stated that the Sales Manager is the only one who is allowed to make an exception to the return policy and that exceptions must be kept to a minimum to keep store profitability up. The Store Owner has also

requested that cash refunds should only be given in cases where no other suitable course of action can be taken to correct the situation.

You purchased a smartphone 20 days ago for \$149. The sales associate at the time stated that the phone offered a great battery life with over nine hours of talk time, and was Bluetooth compatible. Three days after purchasing the phone, you left the state for a 14 day business trip. While on the trip, you found that when you called people they had trouble hearing and understanding you because of background noise or an “echo”. The battery needed to be charged every six hours, and the Bluetooth connection was substandard at best. While on your trip you purchased another battery for the phone thinking that might have been the issue, but the battery life did not improve. In addition, you had you use a hotel’s land line to connect with one of your customers due to the poor quality of the phone resulting in long distance phone charges.

Three days after returning from your business trip, you finally had time to return to Phones & More to seek a refund for the smartphone. A sales associate at the store informed you that you only had 14 days to return the phone and that the receipt showed you had missed the time frame by six days. You are very unhappy and have asked to speak with the Manager (participant) about the situation. The sales manager (participant) has been informed by the sales associate that you were out of town which caused you to miss the return deadline, and that you are dissatisfied with the quality of the phone; however the sales manager (participant) has not been filled in on the specifics of your situation.

The discussion with the sales manager (participant) will take place at one of the POS Stations on the sales floor. You will begin the role-play by greeting the sales manager (participant) in an upset manner and asking for clarification on the store’s return policy.

During the course of the role-play you are to ask the following questions of each participant:

1. Why 14 days and not 30 days?

Possible answers:

- *Most people will “play” with their new phones right away and will be able to determine if they like it or not in that amount of time. Plus, in order to resell the phone we need it back in “like new” condition which may not happen past the 14 days*

2. Why did the sales associate lie to me about the phones specifications?

Possible answers:

- *Our sales associates are well trained on each phone, but they may not have understood your phone usage. The battery life of your phone can be impacted by apps that may be running in the background, etc.*

3. Why should I continue doing business here, when I can get the same phone at the store across the street and not worry about paying a restocking fee?

Possible Answer(s):

- *They sell many different items and can arrange different return policies with their manufacturers that we may not be able to. Also, our sales associates are trained by the manufacturers of each phone we sell.*

At the appropriate time, you will conclude the role-play by thanking the sales manager (the participant) for their time.

You are not to make any comments after the event is over except to thank the participant.

## JUDGE'S EVALUATION INSTRUCTIONS

### Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

### Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

| <b>Level of Evaluation</b> | <b>Interpretation Level</b>   |
|----------------------------|---|
| Exceeds Expectations       | Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.  |
| Meets Expectations         | Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.                    |
| Below Expectations         | Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator. |
| Little/No Value            | Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.                               |



**RETAIL MERCHANDISING SERIES, 2015**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**  
DISTRICT EVENT

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA: Customer Relations**

Did the participant:

| Did the participant:          |   | Little/No Value | Below Expectations | Meets Expectations | Exceeds Expectations | Judged Score |
|-------------------------------|---|-----------------|--------------------|--------------------|----------------------|--------------|
| <b>PERFORMANCE INDICATORS</b> |   |                 |                    |                    |                      |              |
| 1.                            | Demonstrate a customer-service mindset.   | 0-1-2-3-4-5     | 6-7-8-9            | 10-11-12-13        | 14-15-16             |              |
| 2.                            | Handle difficult customers  | 0-1-2-3-4-5     | 6-7-8-9            | 10-11-12-13        | 14-15-16             |              |
| 3.                            | Interpret business policies to customers/clients  | 0-1-2-3-4-5     | 6-7-8-9            | 10-11-12-13        | 14-15-16             |              |
| 4.                            | Handle customer/client complaints   | 0-1-2-3-4-5     | 6-7-8-9            | 10-11-12-13        | 14-15-16             |              |
| 5.                            | Explain the nature of positive customer relations   | 0-1-2-3-4-5     | 6-7-8-9            | 10-11-12-13        | 14-15-16             |              |
| 6.                            | Reason effectively, use systems thinking, make judgments and decisions, and solve problems? | 0-1-2-3         | 4-5-6              | 7-8                | 9-10                 |              |
| 7.                            | Overall impression and responses to the judge's questions                                   | 0-1-2-3         | 4-5-6              | 7-8                | 9-10                 |              |
| <b>TOTAL SCORE</b>            |   |                 |                    |                    |                      |              |