

Radically Re-imagining the Sam's Club Exit Experience for Members



Presented by UNT MA Interaction Design students in
Professors Cassini Nazir and Brian Sullivan courses

Overview.

Our presentation covers ...



Our Process

- Observe
- Interview
- Map
- Build
- Imagine



User Research

- **75 pictures** in our photo journal
- **22 hours** of observing members and associates
- **19 site visits** to different Sam's Club locations
- **30 pain points** identified in the journey map
- **13 stakeholders** identified in stakeholder map
- **4 personas** reviewed (includes COVID impact)



Pain Points & Insights

- **2 maps** built for Scan & Go and Self-Checkout
- **111 steps** in the current-state exit experience
- **30 pain points** identified, validated, and prioritized
- **60 opportunities** brainstormed by the project teams



New Concepts

- **20** new concepts
- **20** storyboards



Appendix

- Photo journal
- Persona validation
- Interview scripts
- Service blueprint
- Stakeholder map
- Empathy immersion

1

2

3

4

5

Our Focus.

Focus on Two Exit Processes: Increased Digital Adoption



Scan & Go



Self-Checkout



Curbside Pickup



Belted Checkout

- Broad adoption of digital technology
- Optimize members' digital experience
- Opportunities to reduce shrink and increase sales

- Future exploration of other checkout methods

Overview.

Radically reimagining means ...

Orchestration

Ensure **smooth transitions** between Scan & Go, checkout, and exit phases

Experiences

Help shoppers **have a quick, pleasant** checkout and exit experience

Savings

Reduce shrink at club locations, during the checkout and exit processes

Service

Provide exit associates with **opportunities to better serve members**

Key Areas



Aid Associates

Improve customer service for Associates.



Empower Members

Members have choices on how they want to exit.



Save at Scale

Refine experiences & processes at scale.



Minimize shrink

Proactively prevent and minimize shrink.

Our Process•

22 graduate students re-imagined the exit experience through various research and design thinking methods



Observe



Interview

Tells us how people actually interact and what pain points they face in the process

- Observe stakeholders
- Visit several sites
- Shop in the stores
- Create photo journal
- Interview stakeholders
- Review personas
- Study COVID impact
- Analyze competitors



Build

Identify gaps and pain points in the current process into insights for transformative ideas

- Built exit journey map
- Highlight pain points
- Determine gaps
- Brainstorm solutions
- Built a service blueprint
- Review interactions
- Identify process issues
- Brainstorm solutions



Map



Imagine

Innovate and improve the current experience

- Built new concepts
- Drew concept storyboards
- Review/update storyboards
- Present new solutions

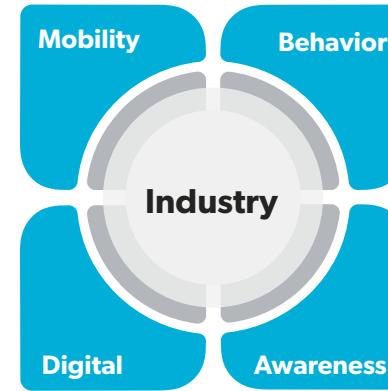
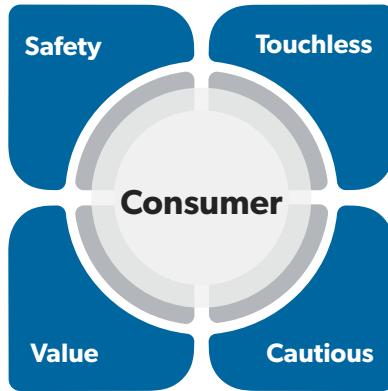
Insights from Site Visits & Interviews

Uncover user needs, goals, and pain points of stakeholders/members during exit



COVID's Impact on Retail: Safety and Digital Adoption

Secondary research revealed additional insights on how COVID-19 has impacted consumers and the retail industry.



Effects on **consumers**

- Consumers are **less optimistic** in the USA
- **Value and quality** are top reasons to try new brands
- People want **touchless** and sanitary experience
- Increase in **digital shopping** with less in-store shopping

Effects on **industry**

- Consumer **habits may not return** to pre-COVID
- **New habits emerged**, blend of home, work, etc.
- Increased **digital adoption** for day-to-day needs
- Mobility patterns changed, with **working remotely**
- Increased awareness on **health, hygiene, and safety**

Insights from 19 Site Visits

Customer Habits: Find a Fast Lane and Avoid Bottleneck at Exit

- Scan & Go and online **shoppers merge into one line**, slowing down the Exit process
- Members with **paper receipts are slower at exit** than those with the receipt on their phone.
- New Now Club members are **confused** by the exit process

Accessibility: Difficult Navigation at Checkout and in the App

- Users need to **easily find an open register**
- Checkout should be **safe, enjoyable, and accessible**
- Scan & Go needs **better navigation** for member help, an in-store map, and other features

NOTE: The photo on the right shows a disabled member struggling to use a mobile scooter



“

"We do catch shrink... Our cashiers get in a hurry. They are engaging with people. They have to sell plus, credit, renewals.

– Club Manager

"We are not doing two people at a time, due to social distancing. So I only have one on a register. Sometimes I will have a supervisor assist, but until people are vaccinated and feel comfortable, I try to keep some separation."

– Club Manager

"If you are blind, you can call in advance with a list and Sam's Club would shop for you. You'd have to pick it up [or somebody for you]."

– Associate Manager

Interview Insights: Intuitive Tech to Reduce Steps



Stakeholder

Member



Manager



Associate

Pain Points

- | | | |
|---|---|--|
| <ul style="list-style-type: none">Double scan at exit is frustratingSelf-checkout screens are too lowUnloading every item in the cart | <ul style="list-style-type: none">Tech is frustrating for membersShrink happening with associatesExplain app to members | <ul style="list-style-type: none">Need help at exit when it is busyFind ways to prevent shrinkSlow exits slows everyone down |
|---|---|--|

Motivations

- | | | |
|---|---|---|
| <ul style="list-style-type: none">Exit process to include a single scanHigher screen to be accessibleFinding items that I want/need | <ul style="list-style-type: none">Make associates confidentNeeds user-friendly technologyNeeds to reduce shrink | <ul style="list-style-type: none">Quick turnaround for backup supportBetter training to prevent shrinkI want the customers to leave satisfied |
|---|---|---|

Implications

A complicated exit process leaves the customer feeling frustrated, not valued

Tech should serve our members and employees not be a hindrance

Show how we trust and respect members' time when we excel at doing our jobs

Updated Persona Insights: New Shopping Habits



Persona

Elisha**Shane****Otis****Robyn**

Pain Points

- Recently unemployed
- Had to give up impulse shopping
- Long lines in suburban stores

- Needs to invest in his new small business
- Varied prices in store vs app
- Not enough product reviews

- Club pickup in higher demand
- Inconsistent inventory
- Hard to find associates

- Her business lost revenue due to stay-at-home orders
- Health concerns with COVID-19

Motivations

- Shop for quality and savings
- Loyalty Programs
- Discounts and coupons

- Research driven
- Loves getting the best deal
- Business member perks

- Prioritizes saving time
- High quality in bulk
- Enjoys early hours

- Prefers online shopping
- Only buys what's on her list
- Reduced spending due to financial stress

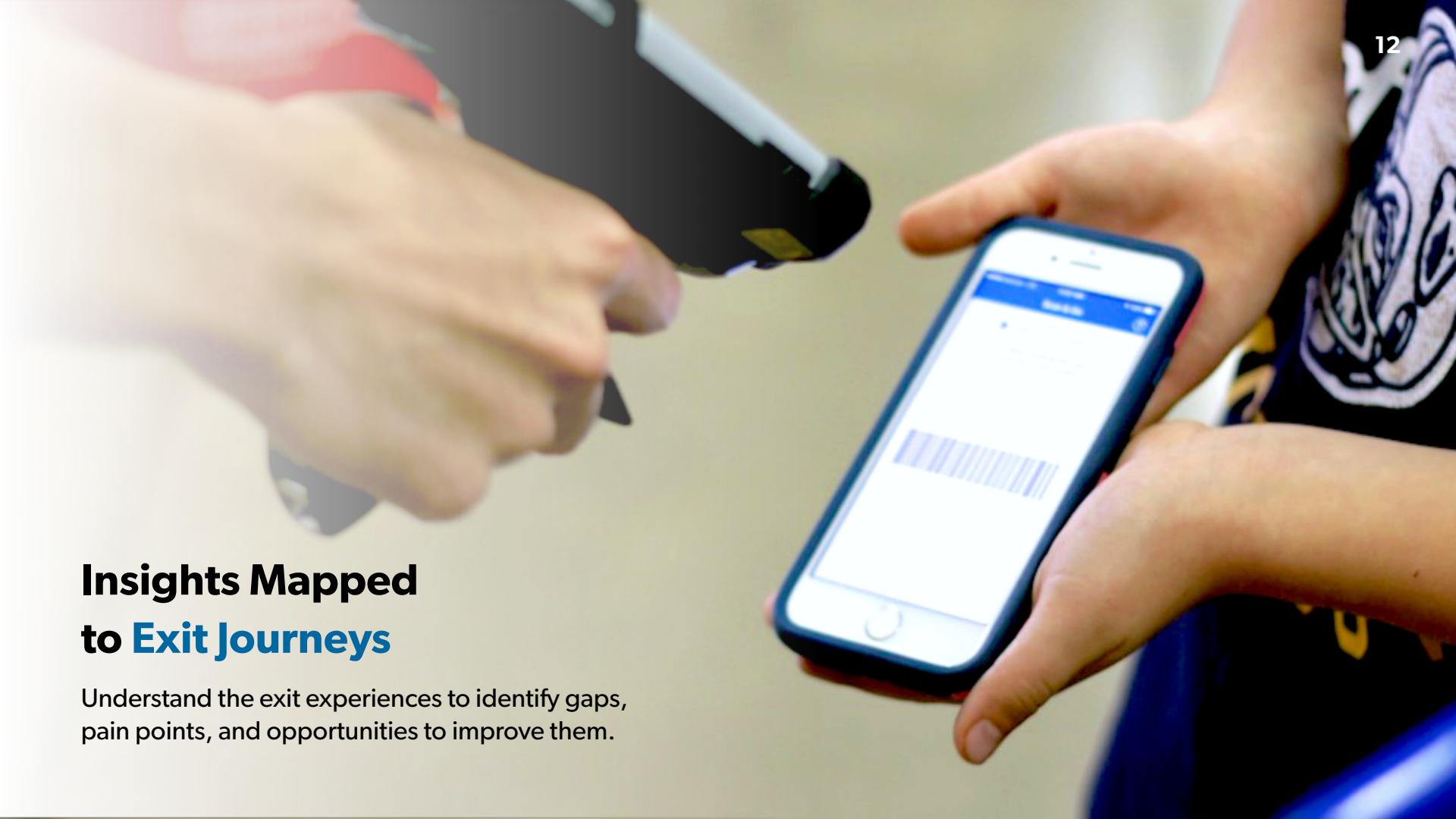
Implications

Shopping priorities shifted for family

Efficient and accurate data informs purchasing decisions

Ability to save time affects business' outcomes

Accurate stock ensures successful online purchases



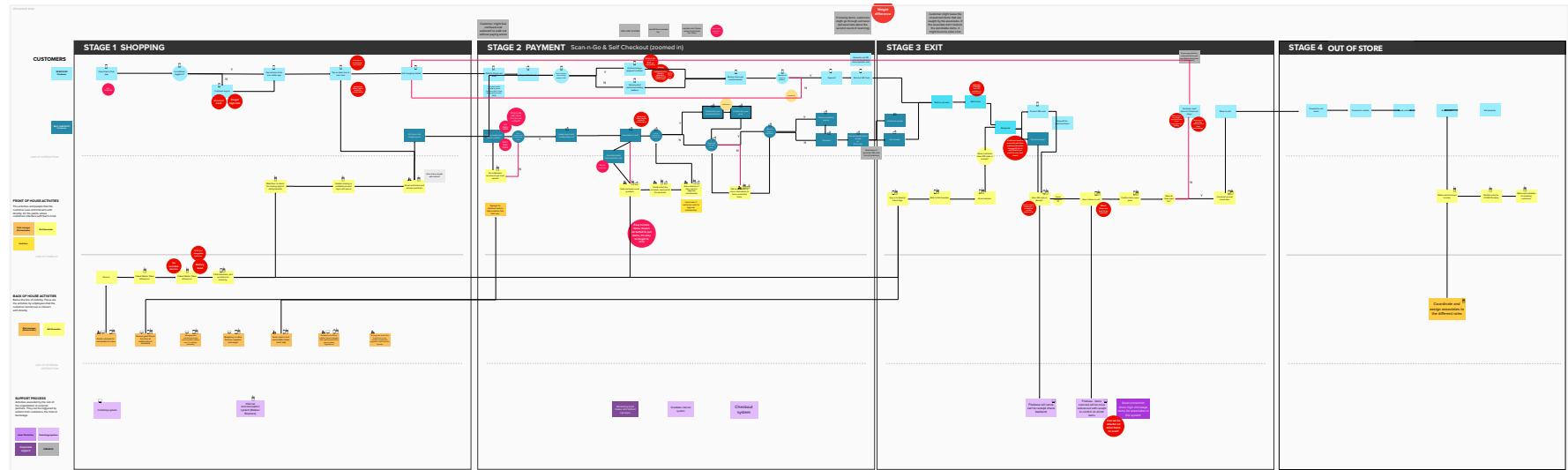
Insights Mapped to Exit Journeys

Understand the exit experiences to identify gaps, pain points, and opportunities to improve them.

Big Picture.

Big Exit Picture: Unseen Member Touchpoints

The Service Design Blueprint shows the current exit experience. It highlights pain points and gaps for members, associates, etc. We identified front-of-house opportunities for Scan & Go and Self-Checkout. With these insights, we built storyboards.

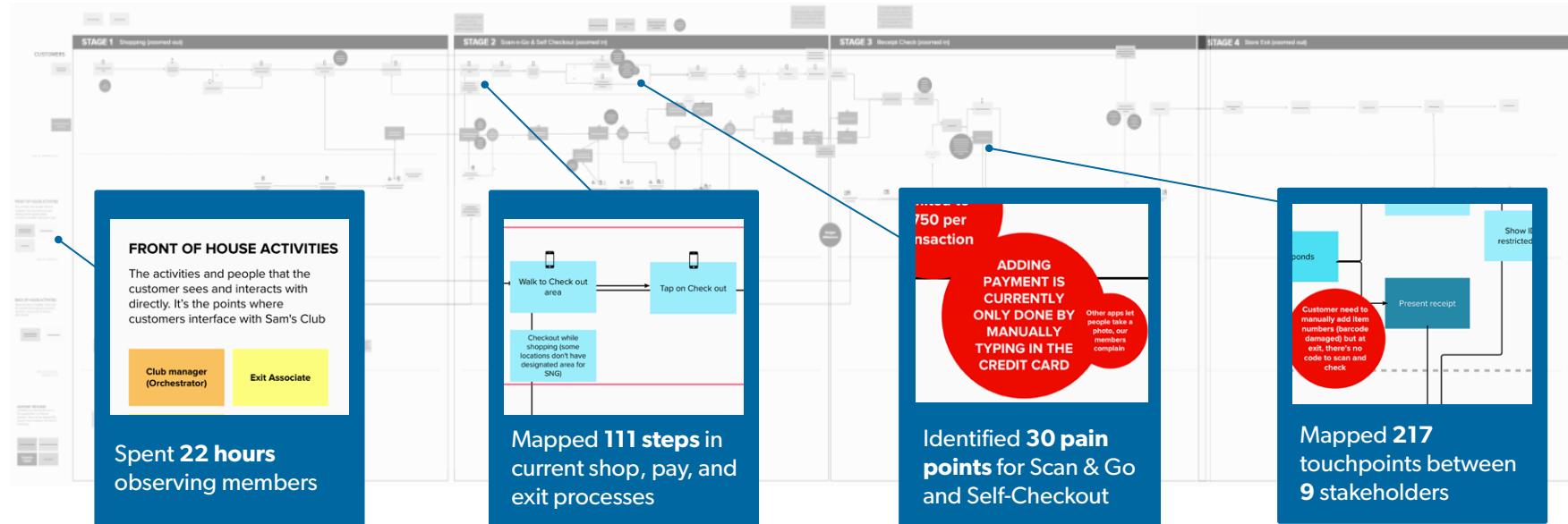


*The service blueprint board can be found in the Appendix.

Big Picture.

Big Exit Picture: Unseen Member Touchpoints

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“

“Following up with the associate [to make] sure we are doing the processes that the company has set in place”

– Club Manager

“My biggest concern as a manager is talent development and making sure our associates are self-sufficient and can handle issues on their own without needing a manager.”

– Club Manager

“If you have any type of glitch that is more an engineering type of subject, it’s really difficult, we can’t really fix it ourselves. So having to reach out and follow-up... I think that is a challenge too... to make sure we get it fixed.”

– Club Manager

Scan & Go Insights: Reduce Workload with Automation



Experience



Process



Tech

Shop

- Accessibility issues cause trouble for differently abled members (eg. No voice prompts)
- \$750 spending cap may lead to lost sales of high-priced items
- Price mismatch between shelf & Scan & Go requires associate help
- No in-store map is missed service opportunity for members
- System can be difficult to navigate causes confusion
- No feedback after an item is scanned leads to human error

Pay

- No split payment causes issues for group shoppers
- No dedicated area for scanning items in cart is prone to human error
- Limited touchpoints causes missed sales opportunities
- No wayfinding for Scan & Go users may cause confusion
- Manually adding credit card is unnecessary work
- Damaged barcodes increase workload for members and associates

Exit

- Waiting in line despite using app leads to a frustrating experience
- QR code check is not contactless
- QR code check can make members feel awkward
- No back up for associates at exit leads to longer wait times
- Restricted items requires ID check at exit
- Limited training may lead to associate and member confusion
- QR code disappears after payment causes unnecessary stress
- Payment and exit requires 2 devices complicating exit experience (ie. member and associate devices)

Self-Checkout Insights: Fear and Frustration at Exit



Experience



Process



Tech

Shop

- Limited availability of hand sanitizer is **missed service opportunity**

Pay

- **No indicator for open kiosks** may be **confusing**
- **Two cart system** increases **workload for members**
(ie. moving child to second cart)

Exit

- Waiting in a second line leads to a **frustrating experience**
- Receipt check is **not contactless**
- Receipt check can make members **feel awkward**

- No back up for associates at **exit** leads to **longer wait time**
- Unpaid items may be abandoned leading to **waste** and **more shrink**
- Restocking abandoned items creates **excess workflow**

- Touch screen and devices create **COVID-19 health risk**
- **Low height of kiosk** may cause **visibility issues** for members

- Payment and exit requires **2 devices complicating exit experience**
(ie. kiosk and receipt check devices)
- Items with **damaged barcodes cannot be scanned**, potential for **missed shrink**

Design Principles for Creating an Exit Experience

We created these principles to guide us as we created storyboards. Use these principles to create a cohesive experience.

Future State Design Principles

Experience	Process	Technology
 End on a High Note	 Member Choice & Control	 Automating Experiences
 Service, Not Surveillance	 Awesome Member Benefits	 Unobtrusive, Intuitive Tech
 Honesty, Humanity & Humility	 Digital Accessibility for Members	 Smart Inventory Tracking

Key Areas



Aid Associates

Improve customer service for Associates.



Empower Members

Members have choices on they want to exit.



Save at Scale

Refine experiences & processes at scale.



Minimize shrink

Proactively prevent and minimize shrink.

Storyboard.

Introducing Ideas

“

“I believe we have eight smart carts, but that is all we have for walking impairments or accessibility.”

– Associate Manager

“If I focus on associates, what are they going to focus on? Members. And that is what drives our business.”

– Club Manager

“I like self-checkout because I can leave everything in the cart. Everything is already organized how I want it so I don’t have to take it out and put it back in. That helps me save time.”

– Member

Mindsets for reviewing storyboards

Storyboards kindle imaginative sparks and unearth new possibilities.



Imagine

Actively imagine ways the storyboard could work.



Believe

Defer judgment. Suspend disbelief. Like watching a 3D movie.



Be Curious

Ask clarifying questions and analyze proposed solutions.



Focus

Stay topic focused. Don't get distracted by tangents.



Ideate

Encourage wild ideas. Similar to dialog in improv. "Yes, and...!"



Play Jazz

Riff on new iterative concepts. Build on ideas from others.



Tinker

Avoid "problem solving" everything during evaluation.



Critique

Review positives before offering critique. "I like, I like, I wonder..."

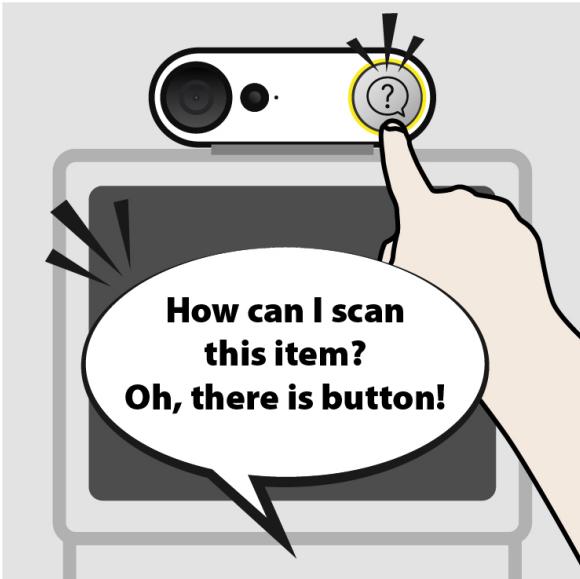
Storyboard.

- 1. Virtual Assistant**
- 2. Automated Scanning**
- 3. Speed Gate Checkout**

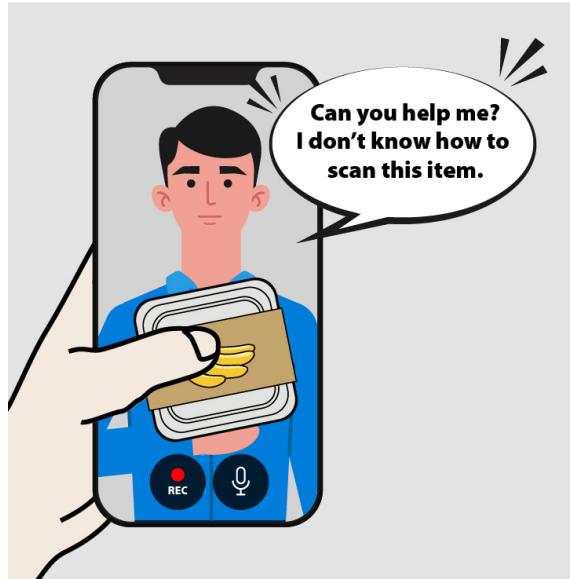
Self Checkout

#1 Virtual Assistant

A member can receive online help from a Virtual Assistant using a call button.



Jay needs help scanning an item, he calls an associate using the help button at the register.



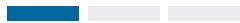
The associate gets an alert on their mobile and check Jay's call in real-time.



The associate helps him remotely in the warehouse, and Jay can proceed to pay without a long wait for the associate.

PAIN POINT

Long wait for members



#1 - Virtual Assistant



Jay needs help to scan the item. He finds the bell on the screen and calls an associate to help.



The associate gets an alert on their mobile and checks Jay's call in real-time.



The associate helps him remotely in the warehouse, and Jay can proceed to pay without a long wait for the associate.

Self Checkout

Long wait for member



This virtual assistant can be available in the Sam's Club app as well.

A member should be able to get help for: finding an item, help to load up their car, lifting heavy items, etc.

Interface can offer help in multiple languages.

Frequent shoppers, such as business owners, can get an upgrade to a higher membership status. This VIP membership upgrade could allow them extra features such as help while they shop, inventory check or request for a second cart.

The manager directs another associate to help the customer in person because of accessibility needs.

Considerations:

- Associates need a mobile device
- Must have reliable WiFi for a video call
- Re-train existing associates
- Multiple language support
- Might be level 2 support, when needed

Delight Members:

- Face to face member interaction
- Quick video response
- ASL and foreign language support

Differentiate:

- Extra feature not offered by competitors
- Next level customer support
- Predictive analytics for proactive support

Implementation: 1- 3 months



Aid Associates



Empower Members



End on a High Note



Awesome Member Benefits



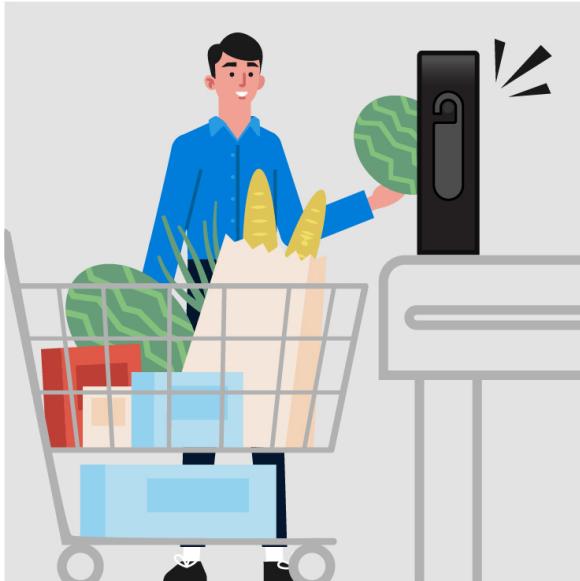
Member Choice & Control



Digital Accessibility for Members

#2 Automated Scanning

A member can scan a full cart in less than 3 minutes using updated scanning equipment.



Chris decides to use the self checkout since it is convenient for him.

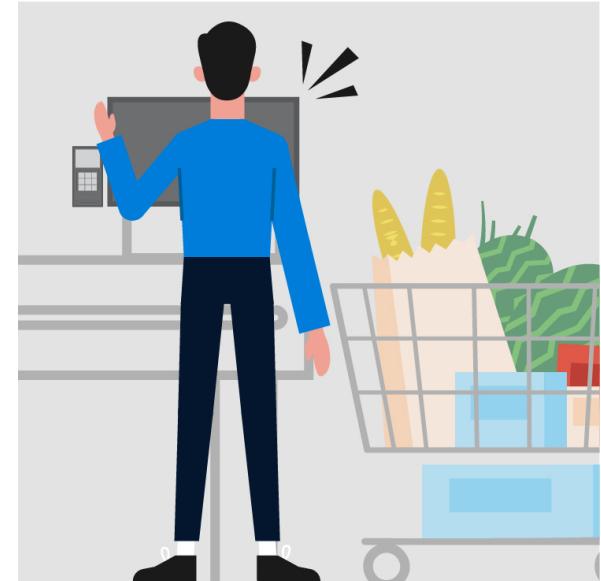


The automated belt can scan 60 items in one minute. Chris can leave the heavy items in the cart and use the wand to scan them.

Self Checkout

PAIN POINT

It's easy to miss items during self-checkout.



Chris pays his amount due at the screen. When he gets to the exit gate he will be confident he has scanned every item.

#2 - Automated scanning



Chris decides to use the self checkout since it is convenient for him.

This automated belt service could be incorporated into traditional belted registers and ease the work of associates.



The automated belt can scan 60 items in one minute. Chris can leave the heavy items in the cart and use the wand to scan them.

This is like facial recognition for packaging.

Scanners use computer vision which scan the package and visually identifies the product without needing to scan a barcode.

These scanners could replace traditional scanners

Self Checkout

It's easy to miss items during checkout.



At the exit gate he is very confident he has scanned every item by using the automated conveyor scanner.

Shoppers may need assistance to load up their carts once they are done scanning.

System can sort through items that need further help such as produce

This system can greatly reduce shrink from human error and reduce the exit receipt check

Considerations:

- Retro-fit existing registers
- Pilot test to optimize configuration
- Belt runs when activated
- Current database with accurate prices
- Scanner wand replaced each time

Delight Members:

- Wand feels "magical" to people
- Less effort lifting and scanning
- Easier self-checkout for large orders

Differentiate:

- State-of-the-art self-checkout
- Reduces human error
- Like facial recognition for packages

Implementation: 1 - 3 years

- Start with one register in target stores



Empower
Members



Minimize
shrink



Service, Not Surveillance



Honesty, Humanity & Humility



Automating Experiences



Member Choice & Control



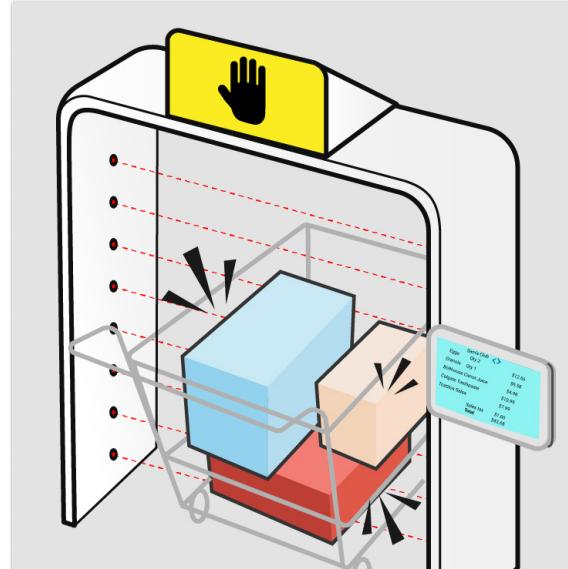
Scan & Go // Self Checkout

#3 Speed Gate Checkout

Shoppers should be able to checkout in 2 minutes or less.



Joe picks up items from his grocery list. Then, he puts the items in his cart. He doesn't notice the RFID tag on his items.



When Joe is done, he goes to the speed gate to check out, which uses RFID technology. He checks in with his membership card. The speed gate scans the cart in less than one minute.



Joe verifies his total amount due and pays using his membership card. The gate notifies Joe that his transaction was successful and the next shopper can now use the gate.

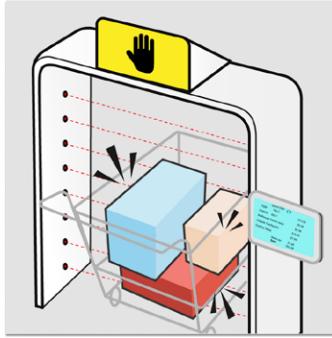
PAIN POINT

Long wait time to checkout.

#3 - Speed Gate



Joe needs to go grocery shopping, he makes a list on her Sam's app and quickly does her shopping.



When Joe is done, he goes to the RFID speed gate to check out. The speed gate scans his cart in less than one minute.



Joe verifies his total amount due and pays using his membership card. The gate notifies Joe that his transaction was successful and the next shopper can now use the gate.

Sam's Club app can incorporate a list feature that works together with the RFID Speed gate and make shopping even easier.

The RFID Speed gate will need to identify, scan, and cross reference with the list on the Sam's Club app.

Members should also be able to pay using digital wallet, or credit card.

Scan & Go // Self Checkout

Long wait time to checkout.



Considerations:

- State-of-the-art inventory tracking
- Products have RFID stickers
- Print weight stickers with RFID for produce
- Alerts for items with no RFID stickers
- Scan barcode if there's no RFID sticker
- Members pay with mobile wallet
- Must train associates and managers

Delight Members:

- Novel, futuristic experience
- Contactless checkout and exit
- Eliminate receipt check
- Reduce checkout time and queues

Differentiate:

- Pilot test to ensure proper configuration
- Predictive product ordering to follow
- First to market at scale

Implementation: 3+ years



Save at Scale



Empower Members



Minimize shrink



Automation Experiences



Smart Inventory Tracking



Unobtrusive, Intuitive Tech

fini.

Next Steps

1

Examine

- Sam's Club identify and explore back-of-house innovation opportunities with these storyboards

2

Explore

- Share report with appropriate business units
- Identify and prioritize experiments / metrics to test storyboards
- Create implementation timeline with metrics

3

Collaborate

- Continue planning and relationship building
- Determine future research opportunities

Appendix

Photo Journal

Service Design Blueprint

Persona Validation

Empathy Immersion

Stakeholder Map

Appendix.

Photo Journal

Scan & Go

This grocery store offers a Scan & Go service where customers can scan their own items at the self-service kiosks. This allows them to skip the checkout line and pay online later.

Scenarios

- Meetings
- Food pickup
- Food delivery

Goals + Expectations

- Want to check out quickly and independently
- Want to avoid long lines at the service counter
- Want to have a quick and easy experience
- Want to be able to scan their own items
- Want to be able to pay online later

Locations + Time

Locations: 1310 University Dr, McKinney, TX 75070
Hours: 8AM - 10PM Daily

The Lens

- Who are the actors?
- What are their goals?

The Experience

- Actions
- Thoughts
- Emotions

The Insights

- Provide an in-store map to facilitate the member locate the product they are looking for
- Mention clear in the app that there is a coupon when member use Scan & Go option
- Put proper Exit direction sign for the members who use Scan & Go

NOTES

PAIN POINT

INFO

EMOJI

FEEDBACK

Self Checkout

Self-checkout stations are available for members to scan their own items and pay online later. This allows them to skip the service counter and pay quickly.

Scenarios

- Meetings
- Food pickup
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Goals + Expectations

- Want to check out quickly and independently
- Want to avoid long lines at the service counter
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- Want to be able to scan their own items
- Want to be able to pay online later

Locations + Time

Locations: 361 Cox Rd, Plano, TX 75071
Hours: 8AM - 10PM Daily

The Lens

- Who are the actors?
- What are their goals?

The Experience

- Actions
- Thoughts
- Emotions

The Insights

- Provide multiple ways to connect with membership
- Simplify scanning and payment process
- Allow shoppers to use self-service kiosks for quick purchases
- Create an indicator for registered members to know if their card is valid
- Make the wait enjoyable
- Offer incentives for members to use self-service kiosks

NOTES

PAIN POINT

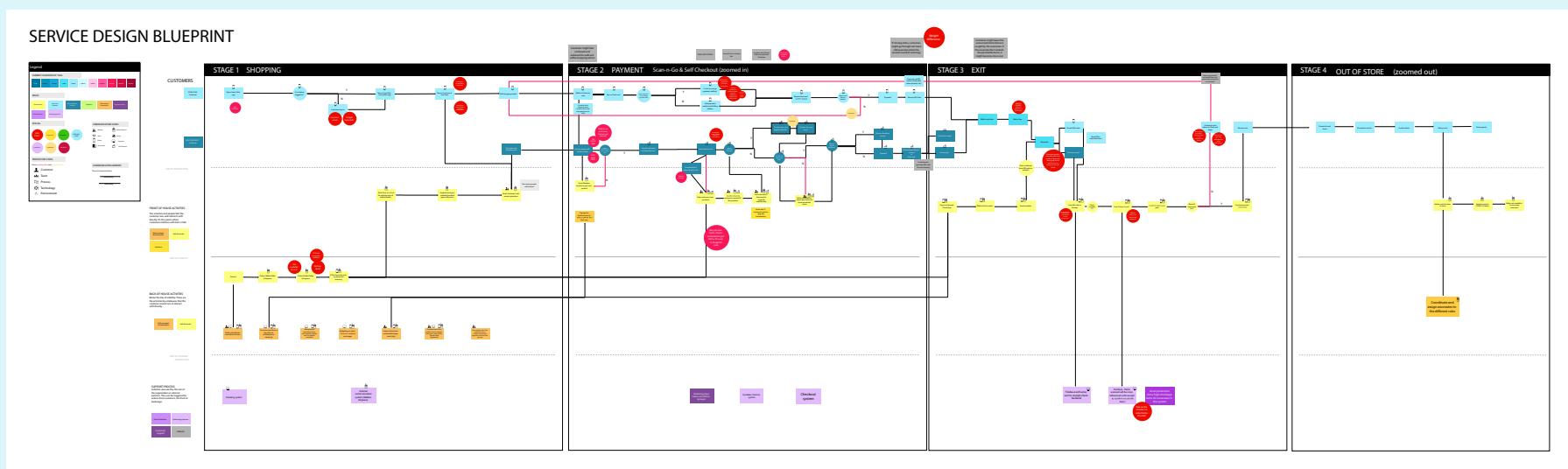
INFO

EMOJI

FEEDBACK

Appendix.

Service Design Blueprint



Appendix.

Persona Validation

sam's club

Persona Validation

Understand who we're designing for

GOALS

In order to design a service solution to the web strategy problems, it's important to understand who we're designing for. This validation exercise will help you review former personas and associate needs, challenges, behaviors, and attitudes in relation to the design solutions.

TIME: 10-minutes TASK: Review, Validate and Vote

AGENDA

- Review Former Personas
- Validate Updated Personas
- Define priority or key design drivers for exit strategy

TEAM

TIPS

Navigate: Click on the house right corner of your screen. Underneath the mini-map, you'll see a navigation bar. Click "Learn more" to change your navigation settings.

Click image to learn more

Add sticky notes: Double-click to add a sticky note. Click on the Sintex type button to switch between a text box and sticky note.

VOTING: When a facilitator starts voting, select a box on any page to add a vote. Shift + Click to remove a vote. Your vote will be anonymous.

Add icons and pictures: Go to the tool bar on the left. Click the icon you want to use and click the image symbol to search for images.

Click image to learn more

FORMER PERSONAS

Review former personas

UPDATED PERSONAS

Validate updated personas and add sticky or comments where needed

KEY OPPORTUNITIES

Design Drivers: Provided are the design drivers across all personas. We encourage further ideation! Feel free to add additional design driver ideas below:

Note on top 4 design drivers that are higher priority for the next process by dragging a star onto the post-it

Drag the design drivers and prioritize them on the wave chart

WAVE CHART

MINUTE TO HOUR

FEASIBILITY

BIG BETS

UNWISE

SMALL WIN

NEXT STEPS

Interview candidates to validate the design drivers, behaviors, and insights generated from this activity. What associated needs and additional design drivers should be also considered?

Appendix.

Empathy Immersion

The image displays four distinct artifacts from an empathy immersion process, each accompanied by a black icon representing a user type:

- Photo Journal, Sam's club in Plano (Colt)**: A grid of photos from a shopping trip at Sam's Club. Annotations include:
 - Shopping carts and moving time
 - Aisle layout
 - Aisle length and goods density
 - Sack Process
 - There is a general lack of visual cues. The aisle ends at the end of the aisle and nothing
 - There is a general lack of visual cues. The aisle ends at the end of the aisle and nothing
- User Journey Map**: A flowchart showing the customer journey from Awareness to Loyalty. Key steps include:
 - Awareness
 - Research
 - Purchase
 - Loyalty
- User Persona**: A detailed profile of a user named Colt, including:
 - Background and context: Colt is a 30-year-old male who works in a software development company. He has a wife and two children.
 - Motivations: To save money and time.
 - Challenges: Colt is visually overwhelmed by the sheer volume of products in the store.
 - Goals: To find the best deals and save money.
 - Personas: Colt is a visual learner and prefers to use his phone to compare prices online.
- User Story Map**: A map of user stories categorized by priority:
 - PRIORITY ONE: Find a way to make the aisle layout more intuitive and easier to navigate.
 - PRIORITY TWO: Implement a mobile app that allows users to scan products and get real-time price comparisons.
 - PRIORITY THREE: Create a visual cue system at the end of each aisle to indicate where the aisle ends and what products are available.

Appendix.

Stakeholder Map

Sam's Club - Exit process stakeholder map

1. Setup
2. Cluster/Label
3. Draw arrows
4. Annotate arrows
5. Document insights, pain points
6. Quick readout

1. Setup

On a sticky, write a stakeholder and their role. Identify all the stakeholders. (One per sticky).

On a separate sticky note, write the goals for each stakeholder and place them on the board. (Use a different color)

On a third sticky, write a "quote" that relates to the role and place it below the goal for each stakeholder. (Use a different color)

2. Cluster

Cluster stakeholders by roles and goals into similar groups.

3. Draw arrows

Use different lines and arrows to note the current strength of the relationship.

4. Annotate arrows

Annotate each of the arrows by briefly explaining why the relationship has its current strength.

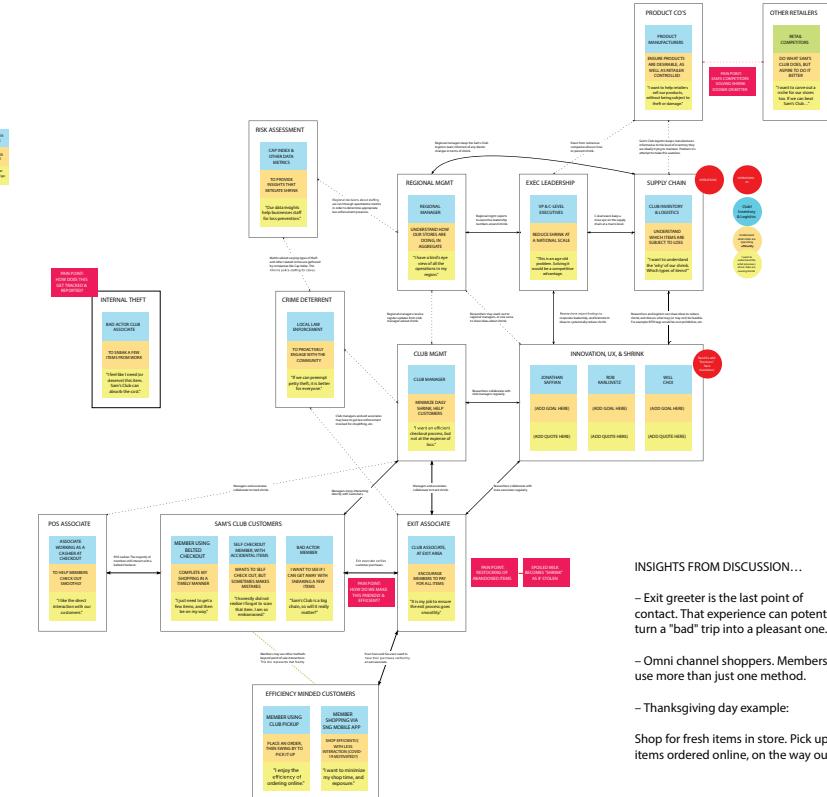
5. Document Insights, pain points

As a group, use pink sticky notes to document any insights and pain points relevant to the subject area you are wanting to explore.

Decide as a group on the top three insights. Write those next to your stakeholder map.

6. Quick readout

Who are your main stakeholders? What are the key relationships? What do our users need to get from our stakeholders? Do you need to talk to some stakeholders for more insights?



sam's club ◇

