

Retail Sales Conversion

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Summary

This proposal summarizes our understanding of the current need with solution recommendations. It also provides education about how we build our solutions. At the end, we provide next steps for you to consider.

Agenda

1. [REDACTED] Overview
2. How We Build
3. Our Content Strategy
4. Build & Strategy
5. Your Build Goals
6. Short Sims Overview
7. Next Steps

Rothy's Overview

About

Rothy's is a direct-to-customer shoe retailer, their shoes are made using eco-conscious processes and recycled materials.

Currently have 12 retail stores and want to expand these.

Looking to reconfigure the retail in-store experience to increase conversion rates.

Recently, they implemented a new Knowledge Base + LMS tool called Zipline.



Needs & Problems

Rothy's retail in-store conversion rate is not where they would like it to be and have identified a way to reconfigure stores to better address this.



Impact

Reconfiguring the in-store experience requires retail employees to be trained on best practices for conversion success and to do so in a short amount of time while on-the-job.

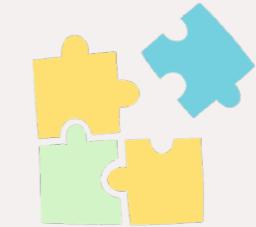


Outcomes

What are the goals or success criteria for the solution? What is an ideal outcome after a solution is implemented?

Rothy's retail aims to build a lasting and trusting relationship with customers so that they trust the brand to come back again and refer to others.

Move customers away from just online purchases to increasing in-store conversion would be a success of the pilot in-store experience and training.



Recommendation

What products or services help resolve their needs or problems? How? Why? Potential metric impact?

We recommend developing a series of short sims that take retail employees through an in-store experience with a customer. During the short sim they will encounter conversion best practices and experience common mistakes in order to avoid consequences in the real world.

We also recommend creating an outline for retail curriculum that could be used in the near future to further expand on these topics in the Knowledge Base/LMS.

How We Build

Stages of Building

Summary We follow a staged approach in developing learning solutions. This allows us to move rapidly and assess the content needs for your solution quickly. It also allows for adjusting the project to any unforeseen obstacles and to plan ahead in our development.



Plan

We build a blueprint of your learning solution. This involves co-design through workshops where we work to understand goals, actions towards those goals, available content or resources, and common mistakes. Beyond workshops, our activities may include audits of content. Once the plan is established, we may need to break down our execution into multiple phases.

By the end, you will get a comprehensive plan or “blueprint” which includes a summary of activities, a solution design and strategy, implementation plan, and a curriculum outline.



Foundation

Using our Plan, we aim to build the foundation for your solution. Sometimes this involves multiple phases like auditing and transitioning content into a platform, and creating drafts of content for version history. We aim to build a strong backbone that is easy to maintain and keep growing. The goal is to create a Knowledge Base for learners, having the right content in an easily accessible space. We may build prototypes to test out content and platform.

By the end, you will have content in text format that is suitable for your learning platform, easy to update and publish. It is not optimized for learning, but focuses on accessibility for your learners.



Functional

Once the Knowledge Base is established, we edit text content for a better learning experience. The goal is to make it easy to read in a short amount of time (many employees only have 20 minutes per week for learning!). We have a content strategy that breaks down content into a simple format that lets learner grasp concepts in a minimal amount of time. This may include simple interactions like quizzes, tasks, or basic activities. We may build prototypes to test out content and platform.

By the end, your Knowledge Base materials will be optimized for a great learning experience. Text is broken down and simple interactions incorporated where necessary.



Decor

While optimizing your Knowledge Base, we look for opportunities to deepen engagement with content. In order to do this we use graphics like illustrations, gifs, short videos or even build short sims (complex interactions). Depending on the content goals, this may be necessary to achieve them.

By the end, you will have graphics or complex interactions that support your text material and help learners further engage with the material.

Our Content Strategy

How it works

Today, in our fast-paced technology driven workplace, your employees are more productive than they ever were, but they do not have the time to sit for 1+ hours to complete trainings.

Our focus tends to be creating microlearning. Employees typically have less than 20 minutes per week or, if you're lucky, 5 minutes per day to complete any learning and apply it. We want to create a learning solution they can use, and return to throughout their day. We want to make them feel like they have the resources to be successful.

Knowledge Base

Learners need a way to get the answers when they need them without have to track down someone in the know. A knowledge base provides them with a self-serve online library of information in context and a place to learn about your product, service, department, topic, or concept.

This may require creating a content strategy or content map that outlines how to structure the content, so it is easy to locate. We also want it to be easily digestible, so readability is a key factor (also for accessibility needs like screen readers).

Examples

- Primarily Text Format
- Articles
- Use Cases
- Templates
- How-tos

Meaningful Interactions

Learners need the opportunity to practice in a spontaneous way as people do in their day-to-day. These interactions can be found alongside other materials in the Knowledge Base.

How we break down meaningful interactions:

- Experience - Create a situation that mimics their workday
- Error - Allow them to experience the consequences of their decisions and mistakes
- Emotion - Make them care about the situation and elicit emotion by creating something they care about.

Examples

- Short Simulations
- Use Case Storybook
- Narrative Job-Aids
- Role-playing Activities



Sam has a question about a new process, but doesn't know who to go to. They consult the Knowledge Base. Their goal is to understand X process and how-to perform it. They take a quiz to test their understanding of the process.

Knowledge Base

- Why use this new Process
- Process How-to
- Process Quiz

Now Sam needs to understand how this new process might impact their clients and teammates if not done correctly. They find a short sim to practice the consequences and mistakes that can be made. This helps them apply their learning, understanding the impact and how to avoid these mistakes.

Knowledge Base

- Why use this new Process
- Process How-to
- Process Quiz
- Short Sim

Build Phases & Content Strategy

How it works together

Summary Here we outline how our building stages and content strategy work together. During the Plan and Foundation stages, we want to establish a solid Knowledge Base. Next, during Functional and Decor, we focus on developing Meaningful Interactions around the content in the Knowledge Base, further engaging your learners.



Plan



Foundation



Functional



Decor



Knowledge Base

Meaningful Interactions

Your Build Objectives

Building for You

Summary Here you will find objectives we have determined for you and how they align with our building method.

Objective

During this stage, what is our objective for [REDACTED]

Co-design a retail curriculum outline to be used in the future to expand on the knowledge provided through the short sims.

Objective

Not applicable

Objective

Not applicable

Objective

During this stage, what is our objective for the client?

Design and develop a series of short sims that provide retail employees with playable scenarios.



Plan



Foundation



Functional



Decor

Knowledge Base

Meaningful Interactions

Short Sims Overview

Short Sims

Summary Short Sims (Simulations) allow for retail employees to experience a day in the life in their role.

Here we layout 5 scenarios based in customer-type. Using conversation best practices and common mistakes we build out each scenario.

Requirements

Summary This is what is needed to create short sims.

- Documentation of conversion best practices
- 1 hour interview with Subject Matter Expert (SME) typically a sales team member to discuss these scenarios and best practices, sometimes a follow up may be needed
- Alignment on the look and feel of short sim (graphic stylings)

1

Loyal
Customers

In this sim, employees encounter and converse with a loyal customer – they learn conversion tips to solicit their input, retain trust, and build rapport.

2

Discount
Customers

In this sim, employees encounter a customer looking for discounts - they learn how to navigate and focus these conversations on specific products.

3

Impulse
Customers

In this sim, employees encounter impulse-buy customers - similar to Wandering, they don't have a particular focus, learn how to build excitement for a possible buy.

4

Need-Based
Customers

In this sim, employees encounter a need-based customer who has come in focused on a specific product but needs knowledgeable support to make the buy leap - learn how to provide or get them the help they need.

5

Wandering
Customers

In this sim, employees encounter a wanderer - a customer who has come in to take in the experience of the store, learn how to guide them to make the most of their time.

Next Steps

Proposal Overview

1.Design and Develop 5 Short Sims

- Interview SME(s)
- Script and draft Short Sims
- [REDACTED] provides feedback
- Short Sims revised and published
- Tested with retail employees
- Retail employees provide feedback
- Short Sims revised final time

2.Co-design retail employee sales curriculum

- Collaborate through workshops to design a curriculum outline
- [REDACTED] team can use outline to expand on related education to short sims

Things to do

1

Identify Subject Matter Experts for interview and schedule

2

Script and draft Short Sim scenarios

3

Develop Project Timeline to meet October launch