

Self Checkout System 4845



Store Training Handbook



First Edition (January 2005)

This edition applies to IBM Self Checkout System machine type 4845, models 130, 150, and 170.

If you have comments or suggestions on how to improve this handbook, address them to:

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Who should read this handbook

The purpose of this handbook is to provide information that an experienced trainer can use to plan and deliver in-store training in support of the IBM 4845 Self Checkout solution models 130, 150, and 170.

Prerequisite Skills

To deliver effective in-store training on the IBM Self Checkout solution, it is necessary to have a good, basic understanding of the self checkout system hardware and software operation. The purpose of this document is NOT to provide this basic understanding. Refer to the next section in this handbook for information on how you can develop these skills.

It is recommended that the trainer using this handbook has the following prerequisite background knowledge and experience as a minimum before leading self checkout training sessions.

You should be able to:

- Distinguish between the various models of the IBM Self Checkout systems and identify individual components of each model
- Conduct an unaided demonstration of the operation and functionality of the IBM Self Checkout solution
- Explain and demonstrate the proper procedures for processing items and tendering orders
- Explain the functions of the lane and Back Office System Server (BOSS)
- Discuss the interaction between the IBM Self Checkout system and the store point of sale (POS) system
- Explain and demonstrate the security features of the IBM Self Checkout system
- Explain the relationship between in-store best practices and self checkout utilization
- Explain and demonstrate the role and importance of the shopper assistant
- Identify self checkout best and worst practices in the field
- Demonstrate the proper procedures for helping shoppers with assistance-required situations
- Explain and demonstrate normal cash loading and unloading procedures
- Explain and demonstrate store-level procedures required to successfully correct security database problems.
- Determine and correct the root cause of common lane problems

How to build your skills

If you are new to self checkout or you just want to increase your knowledge about the IBM Self Checkout product line, there are several educational offerings available to help you. For more information on the available resources or to enroll in a course, go to the Global Retail Store Education team Web site at:

www.ibm.com/education/retail/

Related publications

The following publications contain the core information you will need to conduct the training as outlined in this handbook.

| <u>Publication Title</u> | <u>IBM Publication Number</u> |
|---------------------------------|--------------------------------------|
| Overview | GA27-4340-00 |
| Hardware Operations Guide | GA27-4341-00 |
| Store Operations Guide | GA27-4342-00 |

These publications provide additional detail and information on installing and servicing the 4845 systems.

| <u>Publication Title</u> | <u>IBM Publication Number</u> |
|---------------------------------|--------------------------------------|
| Service Guide | GY27-0419-00 |
| Installation Guide | GA27-4346-00 |
| Parts Manual | SI31-0105-00 |

The latest version of these and other IBM publications are always available at the IBM Retail Store Solutions Support Web site at:

www.ibm.com/industries/retail/store/support/

Before you train

Before conducting a self checkout store training session, you should always meet with the appropriate account team members to discuss and understand the specific hardware or software customization that has been done for the customer. Some common customizations, which will vary between customers include:

- Coupon handling
- Age-restricted item handling
- Opening/closing screen graphics and/or audios
- Tendering options
- Learning Not on File (NOF) item procedures

How to use this handbook

This handbook is designed to be used as a companion to the IBM 4845 Self Checkout publications. These publications contain detailed information on the IBM Self Checkout systems that is not replicated in this handbook. You should refer to the appropriate publication to familiarize yourself with the specific 4845 systems located in the customer's store before you arrive on-site for the training.

Generic training outlines and Quick Reference Guides are provided along with this document. As you engage with a customer to conduct the in-store training, you should print these items and provide copies of them to the customer for reference once you leave the store.

How this handbook is organized

This handbook is organized into sections correlating to the in-store job roles that will require training on the self checkout solution. Note that not all job roles will be present at all customer locations.

The job roles are:

- Store manager training
- Department manager training
- Security manager
- Front-end manager
- Shopper assistant training
- Cash office training

Each section is comprised of three components that a trainer will need to plan and prepare for a specific training session.

These elements are:

Background information –

Outlines the purpose and goals of the training activity and may also contain any lessons learned that other trainers have shared to help you avoid common pitfalls when planning or conducting this particular training session.

Training outline –

A generic template that outlines a recommended topic sequence for the training session, which should be customized based on the specific customer needs.

Related Quick Reference sheets –

These sheets are intended as refreshers that trainees can use to review specific procedures once you leave the store. They should be customized and printed to leave at the customer site.

Lab Training

This handbook focuses on training that occurs in a customer store environment. Whether this is done at a pilot store or in a roll-out situation, the training outlines and job roles are basically the same. There is another situation, customer lab training, requiring similar training activities that you should be aware of in case you are involved in providing part of this training. Lab training is typically scheduled over a two-day period and is conducted at a customer's headquarters in a POS lab environment. If the customer has identified the store that will host the self checkout pilot, it is likely that the pilot store manager will be in attendance for the lab training.

In preparation for a lab training session, you should work with the appropriate account team members to review the self checkout software functionality and customization. For a typical lab training session, the first day should be spent with representatives of all departments that the self checkout system will impact, such as store operations, IT, security, pricing, POS training, etc. On this first day, a detailed training session is done with explanations of all customization required to integrate the self checkout system to the customer's POS system. You should have discussions about the operational impact that the self checkout system will have on the store's operations and the location of the lanes in the store. It is recommended that you have all representatives do hands-on use of the self checkout system. The second day should include the pilot store manager, front-end manager, head cashier, bookkeeper or cash handler, along with the customer self checkout project manager and the appropriate IBM account team members.

A sample lab training outline is included which lays out the suggested topics and recommended attendees for each session over the two days.

Introduction to in-store training

The term in-store training refers to orientation and operational training on the IBM Self Checkout solution that is delivered in either a customer pilot store or as part of a larger self checkout rollout. This handbook is designed as a tool that an experienced trainer can use in concert with the IBM Self Checkout publications to prepare for and deliver in-store training in either of these environments.

Pilot Store Training:

In a typical self checkout engagement, the customer pilots the lanes in one or more stores. This store is termed the pilot store and is the place where the customer will first see the self checkout lanes operate in a live store environment. It is important that the appropriate training activities take place to get the store and its personnel off to a good start.

The training at the pilot store takes place after the self checkout lanes have been installed at the store location. Be sure to stay in contact with the appropriate account team members so that you are aware of the installation schedule.

There are several job roles that will require training. The training required depends on the person's responsibilities in the store. These job roles and the recommended training are the same for a self checkout rollout except where noted.

The roles addressed in this handbook are:

- Store manager
- Department manager
- Security manager
- Front-end manager
- Shopper assistant
- Cash office

Store Manager Training Outline

Background

Some store managers want to be very involved in the self checkout training while other store managers have specific members of their staff handle key responsibilities. For example, the cash office personnel who handle the money for the conventional lanes will normally be the same people who handle the money for the self checkout lanes.

In some cases, the store manager will have already been involved in the lab phase of the self checkout evaluation for their company. If so, by the time you arrive at the pilot store, the manager should already be familiar with the operation and value of the self checkout lanes. Be sure to check with the account team to verify the store manager's level of involvement prior to the store installation. Even if they have been involved in the lab evaluation, it is important that you talk with the store manager to determine how involved they want to be in the in-store training sessions. Be sure that you include the manager in the training sessions as much as their interest and training schedule will permit.

Before you begin the training, it is important to review with the store manager how you plan to position the role of the staff. A key success factor for a self checkout implementation is that the store employees understand and are comfortable with the self checkout lanes. The store manager can reinforce a positive attitude towards self checkout by presenting the shopper assistant position as an opportunity to help the store and its shoppers, rather than simply an added responsibility. Discuss this with the store manager and reach an agreement on how you should talk about the shopper assistant role in this particular store.

Training Outline

There is no specific training for the store manager because the manager will attend the various sessions that are appropriate for them.

Quick Reference Guides

Store manager should understand all Quick Reference Guides and their uses.

Department Manager Training Outline

Background

Department manager refers to the employees who manage the deli, floral, meat, produce, and any other departments within the store. While the department managers do not need a detailed understanding of the self checkout lanes, it is important that they are aware that the self checkout lanes are installed and their basic operation. Specifically, it is vital that the managers of departments with nonbarcoded or items sold by weight (Type 2) understand how the self checkout lanes process these items. These managers need to be shown that the self checkout lanes will accurately and reliably process the items from their departments.

It is also important that you discuss the importance of maintaining a positive atmosphere about the installation of the self checkout lanes with the department managers. By spending time with the department managers and making sure they are comfortable with the security aspects of the self checkout lanes, you can help the store be more successful with its self checkout installation.

Training Outline

Department managers should attend the same training as the shopper assistant minus the problem resolution section, cash handling, and the understanding of the shopper assistant menu.

Quick Reference Sheets

- Best Practices Quick Reference

Security Manager

Background

The role of the security manager is to oversee the loss-prevention activities in the retailer's store. It is important that this job role understands the security features of the IBM Self Checkout product line. This job role should be invited to a combination of training that includes the security features of the lane, an overview of the BOSS security database, the handling of Type 2 and nonbarcoded items, and the capabilities of the shopper assistant. These capabilities should include price overrides, entering NOF items, and the handling of age-restricted items.

There may be other aspects of the installation that the security manager wants to learn about. Be sure to invite them to the appropriate training sessions and let them decide if they want to attend.

Training Outline

- Log on and navigation of the BOSS
- Learn NOF process
- Security data base parameters understanding and changing
- SCO Best Practices

Quick Reference Sheets

- Boss Quick Reference
- Shopper Assistant Responsibilities
- Universal Payment and Scanning Module Quick Reference

Front-End Manager

Background

The front-end manager has responsibility for the entire front-end of the store. This includes the self checkout lanes as well as the conventional POS lanes. It is important that the front-end manager understand the complete operation of the lanes, including the security system, cash handling, and the role of the shopper assistant. One item of special interest to this job role is the labor scheduling changes that should be made in the front-end to maximize the self checkout installation.

Training Outline

- Shopper assistant responsibilities
- Lane operation
- Cash handling
- Paystation operation
- Troubleshooting Tips

Quick Reference Sheets

All Quick Reference Sheets

Shopper Assistant Training Outline

Background

The shopper assistant has the single most important role in the success of a self checkout installation. Without adequate training and skill, it will be difficult for the customer to realize their business goals related to self checkout. The shopper assistant has three key roles:

1. Host the lanes – encourage shoppers to use the lanes
2. Help the shoppers – help with their items but also train them to use the self checkout lanes
3. Provide additional security

It is vital that you convey the importance of these roles to both the shopper assistants and to the store management.

Training Outline

- Model specific outline as appropriate for the customer

Quick Reference Sheets

- Shopper Assistant Responsibilities
- Lane Troubleshooting Tips
- Assisting shoppers at the SCO
- IBM Paystation Quick Reference
- Cash Components Quick Reference (optional)
- Best Practices Quick Reference

Cash Office Training Outline

Background

The term cash office refers to the person(s) who are responsible for handling the money in a particular store. In larger stores this is usually a separate job function, while in smaller stores, it may be an additional duty. It is important that you understand how this job role functions in the store where you will be training. Specifically, the opening and closing procedures for the self checkout lanes are a little different from the conventional lanes, so make sure the cash office staff, as well as the appropriate store management, understand these differences before you leave the store.

Training Outline

- Corporate limits on cash amounts to load
- Cash loading procedure
- Cash maintenance
- Zero security scale

Quick Reference Sheets

- Cash Components Quick Reference
- BOSS Quick Reference

Appendix A – Training Outlines

The documents listed below are provided in Microsoft Word format so that they can be customized as needed for the specific customer. Each outline is designed to guide a specific training session, but remember that flexibility is important because each self checkout customer will be slightly different.

- Lab Training Outline
- Store Training Outline
- BOSS Training
- IBM Scan and Pass Training
- IBM Scan and Bag Training

Appendix B – Quick Reference Guides

The Quick Reference Guide (QRG) documents listed below are provided in .PDF format so they can easily be printed as needed for the specific customer. As the trainer, you should work with the account team to determine how to best deliver these QRGs. A field-proven method is to have them laminated and placed in the store's training manual or handbook so that all employees have access. Be sure that all of the store trainees know where these QRGs are located, what information is contained in them, and how to use them once you leave the store.

- BOSS Quick Reference
- ACM Scheduler Quick Reference
- IBM Paystation Quick Reference
- Shopper Assistant Responsibilities
- IBM Scan and Pass Quick Reference
- IBM Scan and Bag Quick Reference
- Lane Troubleshooting Tips
- Cash Components Quick Reference
- Universal Payment and Scanning Module Quick Reference
- Best Practices Quick Reference