



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. Identify components of a retail image.
2. Describe the nature of customer relationship management.
3. Describe the use of technology in customer relationship management.
4. Reinforce service orientation through communication.
5. Identify company's brand promise.



EVENT SITUATION

You are to assume the role of public relations manager at FORWARD, the third largest discount retailer in the United States. The CEO (judge) has asked you to determine the immediate steps that need to be taken to inform customers of a security breach and any actions to make that will demonstrate top-level customer relation management.

FORWARD has over 1,300 stores in all fifty United States and in Canada. The stores sell a variety of discount merchandise and a limited grocery department. The stores have become increasingly popular over the last five years with an increase in annual sales of 27% overall.

Due to this success, FORWARD introduced its first store credit card earlier this year, which offers low interest rates and incentives to use the card for online purchases. The company approved over 10,000 credit card applications in the first week alone! Now over 500,000 shoppers use the FORWARD store credit card for purchases.

Last night it was discovered that hackers stole credit card data and personal information from Forward store credit card holders using a malicious computer code. It has been determined that in the last five days millions of dollars have been taken from card holders' personal accounts. The bug was extremely difficult to detect which is why it was only just discovered last night.

The CEO of FORWARD (judge) has asked you to determine the immediate steps that need to be taken to inform FORWARD credit card users of the security breach and also determine what steps can be taken to demonstrate superior customer relations management.

You will present your plan to the CEO (judge) in a role-play to take place in the CEO's (judge's) office. The CEO (judge) will begin the role-play by greeting you and asking to hear your ideas. After you have presented your plan and have answered the CEO's (judge's) questions, the CEO (judge) will conclude the role-play by thanking you for your work.

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 CEO of FORWARD, the third largest discount retailer in the United States. You have asked the public relations manager (participant) to determine the immediate steps that need to be taken to inform customers of a security breach and any actions to make that will demonstrate top-level customer relation management.

FORWARD has over 1,300 stores in all fifty United States and in Canada. The stores sell a variety of discount merchandise and a limited grocery department. The stores have become increasingly popular over the last five years with an increase in annual sales of 27% overall.

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You have asked the public relations manager (participant) to determine the immediate steps that need to be taken to inform FORWARD credit card users of the security breach and also determine what steps can be taken to demonstrate superior customer relations management.

The public relations manager (participant) will present the plan to you in a role-play to take place in your office. You will begin the role-play by greeting the public relations manager (participant) and asking to hear about his/her ideas.

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

1. Why is it important to respond immediately?
2. How does this security breach affect our customers that do not have a store credit card?

Once the public relations manager (participant) has presented the plan and has answered your questions, you will conclude the role-play by thanking the public relations manager (participant) for the work.

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.

Level of Evaluation	Interpretation Level
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 th 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 th 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 th percentile of business personnel performing this performance indicator.



RETAIL MERCHANDISING SERIES, 2015

Participant: _____

JUDGE'S EVALUATION FORM
SAMPLE SCENARIO 2015

I.D. Number: _____

INSTRUCTIONAL AREA
Customer Relations

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Identify components of a retail image?	0-1-2-3-4-5	6-7-8-9	10-11-12-13	14-15-16	
2.	Describe the nature of customer relationship management?	0-1-2-3-4-5	6-7-8-9	10-11-12-13	14-15-16	
3.	Describe the use of technology in customer relationship management?	0-1-2-3-4-5	6-7-8-9	10-11-12-13	14-15-16	
4.	Reinforce service orientation through communication?	0-1-2-3-4-5	6-7-8-9	10-11-12-13	14-15-16	
5.	Identify the company's brand promise?	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	
TOTAL SCORE						