



# HG Retail Training Matrix

## Customer Service Manager Training Checklist

To gain skills and knowledge to be able to competently manage and lead the Customer Service team. To ensure maximum sales, profit and customer satisfaction are achieved through effective merchandising, pricing, inventory control and people management.

Task	Detail	Trainee	Trainer	Date
Induction training	<ul style="list-style-type: none"> <li>Completed in store induction</li> <li>Attended Group Induction</li> </ul>			
Customer Service Training	<ul style="list-style-type: none"> <li>Attended Group Induction</li> <li>Attend Customer Service Rally</li> <li>Mystery shopper program explained</li> </ul>			
Food Safety	<ul style="list-style-type: none"> <li>Food Safety Plan</li> <li>Critical 13</li> <li>Hygiene and appearance standards</li> <li>Cleaning schedules – daily, weekly and monthly</li> <li>Taring and packing of goods - meat</li> <li>Record keeping – temp checks, taring training and recording, fridge temp checks, cleaning schedules</li> <li>Checking scale accuracy – 1 kg weight</li> <li>Certification of scales</li> <li>Rotation procedures for cool room, cold display and forms</li> <li>Rotation for bakery and forms required</li> <li>Date check procedure</li> <li>Difference between use by and best before</li> </ul>			
Customer service	<ul style="list-style-type: none"> <li>Standards &amp; Expectations</li> </ul>			
Department Layout	<ul style="list-style-type: none"> <li>Specials</li> <li>Register ends – impulse sections</li> <li>Coldroom layout - bakery</li> </ul>			
Equipment	<ul style="list-style-type: none"> <li>Pallet Jacks</li> <li>Hoists if applicable</li> <li>Walkie stackers if applicable</li> <li>forklift</li> </ul>			

	<ul style="list-style-type: none"> <li>• Manual Lifting</li> </ul>			
Price Labels/ Sign IQ tickets	<ul style="list-style-type: none"> <li>• How to create labels / print</li> </ul>			
Merchandising Standards	<ul style="list-style-type: none"> <li>• What a good job looks like</li> <li>• Opening standard/timeframes</li> <li>• Cleanliness</li> </ul>			
Front End close	<ul style="list-style-type: none"> <li>• Procedures &amp; Standards</li> <li>• Cleaning schedule</li> </ul>			
Housekeeping	<ul style="list-style-type: none"> <li>• Cleaning materials available,</li> <li>• Training in cleaning chemicals – procedure for cleaning</li> <li>• Correct usage of chemicals</li> <li>• Clean as you go policy</li> <li>• How to order more chemicals</li> </ul>			
Waste & Recycling	<ul style="list-style-type: none"> <li>• Cardboard</li> <li>• Plastic</li> <li>• Food waste</li> <li>• Quarantine area</li> </ul>			
Stock control	<ul style="list-style-type: none"> <li>• Stock rotation FIFO</li> <li>• How to adjust stock through GM</li> <li>• Understanding different stock adjustment codes</li> <li>• How to find specials on My IGA portal</li> </ul>			
Stock room	<ul style="list-style-type: none"> <li>• What a good job looks like</li> <li>• Safety rules</li> </ul>			
Receiving a Delivery	<ul style="list-style-type: none"> <li>• Direct delivery</li> <li>• Metcash delivery</li> <li>• Temp checks</li> <li>• Stamp invoices</li> <li>• Scan invoices</li> <li>• Follow up any credits</li> </ul>			
Grocery Manager	<ul style="list-style-type: none"> <li>• Item maintenance</li> <li>• Stock adjustment</li> <li>• Price changes</li> <li>• How to do stocktakes and run EOP reports</li> <li>• How to do a markdown report</li> <li>• How to do an item movement report</li> <li>• How to setup managers specials</li> <li>• How to do a metcash order through grocery manager - cigarettes</li> <li>• How to do a direct order for magazines, newspapers</li> <li>• How to receive an invoice in grocery manager</li> </ul>			

	<ul style="list-style-type: none"> <li>• How to deactivate lines and reactivate lines new and old</li> <li>• How to create and send scale changes</li> <li>• How to adjust stock</li> </ul>			
PDE	<ul style="list-style-type: none"> <li>• Price check</li> <li>• Inventory</li> <li>• Label request</li> <li>• Markdowns</li> </ul>			
OH & S	<ul style="list-style-type: none"> <li>• Sweep Log</li> <li>• Manual lifting</li> <li>• Security of cash</li> <li>• Armed robbery training</li> <li>• Price verify</li> <li>• Code checks &amp; markdowns</li> <li>• Temp checks</li> <li>• Weights &amp; Measures</li> <li>• SWP demonstrated and signed off</li> <li>• How to complete an incident accident report form</li> <li>• Who to notify of such incidence</li> <li>• Emergency manual</li> <li>• Grievance policy, who to report things to</li> <li>• Ensure fire online training for store is complete</li> </ul>			
Communication	<ul style="list-style-type: none"> <li>• Handover book / diary</li> <li>• Department meetings</li> <li>• Weekly rosters process</li> <li>• Log in obtained for rosterlive</li> </ul>			
Customer request Log	<ul style="list-style-type: none"> <li>• Process &amp; info required</li> <li>• Lost property</li> <li>• Goods left behind</li> </ul>			
Customer orders	<ul style="list-style-type: none"> <li>• Home delivery Correct process</li> </ul>			
Telephone Techniques	<ul style="list-style-type: none"> <li>• How to answer the phone.</li> <li>• How to page.</li> </ul>			
Maintenance issues	<ul style="list-style-type: none"> <li>• How to lodge a maintenance request form</li> </ul>			
People	<ul style="list-style-type: none"> <li>• Staff appearance standards</li> <li>• PINs, written warnings</li> <li>• How to order uniforms</li> <li>• How to order name badges</li> <li>• Prepare weekly rosters</li> </ul>			

	<ul style="list-style-type: none"> <li>• Aware of department budget</li> </ul>			
Register management	<ul style="list-style-type: none"> <li>• Order change</li> <li>• Armaguard receival process</li> <li>• Balance a register paperwork</li> <li>• Register paperwork</li> <li>• Cash discrepancy process</li> <li>• Written warning process</li> <li>• My IGA card process</li> <li>• How to order My IGA cards</li> <li>• Understand and monitor markdowns, keyed sales and voids</li> <li>• Safe management</li> </ul>			