Creating POs and STOs

Intent

To ensure that we earn our customers' trust by ordering their products correctly and promptly

Audience	Apprentice Tech and above
Schedule	Add time for this talk into your weekly schedule. It should only take 10-15 minutes, but you should allow 30 minutes to include extended discussions that may occur.
Prepare	A day ahead: 1) Print and review this talk. 2) Review Special Orders Best Practice and **Creating POs and STOs** section on the Managing Your Inventory KC page. 3) Identify specific opportunities for your store and recent examples that may apply. 4) Plan how you will follow up to ensure performance improvement.
Deliver	Make this real and fun for your people. Bring your energy to the talk and engage everyone to come up with solutions to improve performance. Set clear expectations for your team. Make sure they understand how confirming customer information impacts the **Happy Customer** gauge.
LMS	After the talk, have every participant log into the LMS and complete the acknowledgment.
Follow up	Observe your team members to confirm that they confirm contact information in the POS with every customer. Observe them create POs and STOs to ensure that they create them correctly and enter appropriate information in the PO Comments field.

Creating Special Orders with SHOP

Do: Open the Managing Your Inventory page in the KC. Review the Creating POs and STOs section.

Watch: SHOP Ordering video with your team.

Explain: You are expected to contact every customer when their products arrive. To make this easier, you need to verify that every customer's contact information in the POS is correct and current, including accurate email and phone numbers.

In addition, you need to ask the best way to contact your customer for this special order. If the customer prefers to be called on their cell or work phone, or if they have an alternative email address, or if they want you to contact another person, **you must enter these details in the PO Comments field in SHOP.** This information is not brought into SHOP from the POS automatically.

Answers

Question 1: What information are you expected to verify in the POS for every customer?	Customer's contact information: • Phone, Cell, Work Phone • Email
Question 2: What details do you need to add in the PO Comments field in SHOP?	• Best way to contact customer. • If the customer wants you to call a phone other than the default phone in POS, or any email other than the one in POS, or another person, you need to enter these details in the PO Comments field.

Create SHOP Order

Explain: Ask someone to demonstrate how to place a standard order and how to place an external order in SHOP. Make sure everyone understands the difference between the two types of orders.

Answers

Question 1: What is the difference between a standard order versus an external order?

Standard: SHOP does real time inventory check and places order automatically.

External: You must contact vendor to confirm inventory availability, and you must either check the email option to email PO to vendor or contact vendor separately to place the order.

Read all SHOP Review messages

Explain: When you create an order in SHOP, read **ALL** Review messages. These display in a popup window.
RED messages indicate that you must do something to complete the order.

Answers

Question 1: Why do you need to read review messages?	Review messages provide important information about the order.
Question 2: What do red messages mean?	You must do something to complete the order.
Question 3: What may happen if you ignore the review messages	• If you ignore a red message, you may not realize that SHOP did not complete the order. • If you ignore a success message, you may not realize that the order has been placed, and accidentally double order product.

Call to Action:

1) Ask participants to log into the LMS and complete the acknowledgment for this talk.
2) Set expectations for executing the Best Practice at the store.
3) Explain how you will support this and why you expect this to improve CDI.
4) Ask if anyone has questions. If there are questions or concerns you cannot answer, notify the Store Manager.