

Greeter Role Observation Worksheet

The Intent of the Greeter role is to greet customers upon arrival in the parking lot and use this time to set expectations for the visit by providing them with their options. This also avoids long lines from forming at the sales counter, your salespeople will feel less pressure and have more time to deliver a quality experience for customers calling or transacting in person.

Store # _____ **Date** _____ / _____ / _____ **Time** _____

Expectations: Use this worksheet to identify opportunities to develop your sales team.

Was the customer greeted in the parking lot upon arrival?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Who greeted the customers?	<input type="checkbox"/> Sales Associate <input type="checkbox"/> Sales Coordinator <input type="checkbox"/> Designated Greeter
Were appointment/BOPIS customers identified and handled correctly?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How was the customer added to the waitlist?	<input type="checkbox"/> Not needed, customer helped immediately <input type="checkbox"/> DT/AT Mobile app <input type="checkbox"/> Mobility device <input type="checkbox"/> QR Code
If customer not helped immediately, were expectations set by the greeter for the visit by providing the customer with their options?	Options: <input type="checkbox"/> Customer lounge <input type="checkbox"/> Outdoor seating area <input type="checkbox"/> In their vehicle
How long did the customer wait before being helped by a Sales Associate?	_____ minutes
Are long lines being avoided at the sales counter?	<input type="checkbox"/> Yes <input type="checkbox"/> No