Personal Shopper User Guide

PERSONAL SHOPPER

Fresh Start Furniture Bank's mission is to help restore hope, dignity, and stability in our community by recycling donated furniture and housewares, for free, to people in need. Our personal shoppers have the most contact with our clients and, therefore, play an important role in reinforcing our mission statement. The personal shopper is the lead individual who is responsible for understanding the needs of the client and assisting the client in selecting furniture and other household items. It is imperative that the shoppers always keep in mind the dignity of our clients and ensure that they are treated with respect and leave their shopping experience feeling like they have been given a fresh start for a hopeful future.

If at any point you are having difficulties in your interactions with your client and feel that you need support, please ask the front desk personnel.

Furniture Selection Overview

Furniture is selected based on the supply that Fresh Start currently has, what the client needs, the space restrictions in the client's dwelling, and transport restrictions. When showing furniture to a client, the personal shopper should get an understanding from the client regarding the size of their dwelling and any concerns about moving the furniture (e.g. availability of help to carry the items, what floor the apartment is on, tight hallways, stairwells, elevators, or door openings, etc.). The client's transport vehicle(s) also dictates the amount and size of furniture chosen. If the vehicle capacity is in question, feel free to ask the lead in-store mover to have someone measure the vehicle so you better understand your space limitations.

The client selects the furniture based on their style and color choices; it is not appropriate for the shopper to select the furniture for the client. However, if the client finds the shopping process overwhelming and/or is experiencing extreme indecision or anxiety over the process, the personal shopper may help the client to come to a decision.

The inventory of furniture is constantly changing. As long as there are two pieces of furniture in any given category (e.g. kitchen tables), the client must choose between the two pieces if they are interested in that furniture category. *They cannot return for a second visit in hopes of a different selection on their follow-up visit.*

Meeting the Client and Preparing to Shop

Please refer to the laminated “Flow for Check In & Starting to Shop” at each shopping station for an overview of the information presented in this manual.

1. Set yourself up at one of the four desks with a laptop computer found in the annex. Enter your email address and password on the Fresh Start Furniture Bank login page and select ‘Personal Shopper’. You are now logged into the web-based virtual shopping application (‘app’). (Note: If the previous shopper is still signed in, please logoff the previous volunteer and sign yourself in.)
2. When a client arrives for their appointment, the client check-in volunteer will give you the **Client General Check in** sheet. Some of this sheet will be completed and will detail:
    1. The client’s name and the number in the family
    2. The ages and sexes of the children of the client
    3. The vehicle(s) that will be used to transport the client’s furniture, etc. (vehicle type, license plate #, any restrictions on use)
    4. Whether a Target gift card was given to the client
3. After greeting the client and identifying yourself, you will complete the rest of this form:
    1. The client’s needs for mattresses, box springs or platform, metal bedframes, and headboards (by member of the family, by bed size)
    2. The items the client is interested in getting today and any priorities, if space is limited
    3. What floor the client lives on
4. You will also complete the **Client Release form**, the **Linens Wish list**, and the **Kitchen Wish List**. Hand off the kitchen and linens wish lists to the volunteers on the shift who are packing those items.
5. In the rare instance that the client has visited the store previously, you will be provided with a list of all items that the client has previously selected. You will need to keep these items in mind when offering additional items to the client.
6. There are five tabs or screens in the shopping app: Client Info, Items, Chat, Audio, and Release. Three of these tabs (Chat, Audio, and Release) are not currently used by the shopper.
7. The shopper is initially on the Client Info screen. Choose the client’s name from the ‘Select client’ drop-down box. The Client Info screen will then be populated with the client’s info. The client check-in volunteer will review the client with you and tell you if any of the client’s contact info needs to be updated. After you make any updates to the contact info, select the green ‘Update’ button found under the contact info.
8. Review the transport choices under Vehicle 1 (and Vehicle 2, if applicable) on the Client Info screen and select the closest match for the client’s vehicle(s). It is not necessary to list the license plate number as the check-in volunteer will have tagged the vehicle. As the client chooses furniture, the app will calculate what percentage of their transport vehicle is full. You can see this percentage at any point while you are shopping by looking back at

this Client Info screen. Once the app calculates that you have filled 50% of the client's transport vehicle(s), it will continually remind you of the percentage filled.

9. Before shopping with the client, you should put the **Check-in Items** in the client's cart as follows:
    1. The shopper selects the Items tab.
    2. In the 'Item Class' drop-down box, the shopper selects 'Check-in Items'.
    3. In the 'Item Type' drop-down box, the shopper selects 'Carts for homegoods' and presses the green 'Add to Cart' button. This cart is the reminder for the movers to collect the client's non-furniture items.
    4. The cart, in the upper right-hand corner of the items screen, should now show '1' item.
10. If a Target gift card has been given to the client, the shopper should enter the Target card into the client's cart similar to the instructions above (Item Type is Target gift card).
11. You are now ready to shop with the client.

Beginning Shopping

1. At each shopping station, there is a laminated double-sided **"Flow for Check In & Starting to Shop"** sheet. This sheet provides guidance for shopping in an organized manner starting with small kitchen items, moving onto furniture, and ending with lamps and artwork. In some instances, due to transport vehicle restrictions and/or priorities of the client, the personal shopper will present items in a different order but a review of this sheet is always helpful to confirm that you have offered all of the categories of items. **This sheet also tells you the categories ('Item Class') in the app where you will find each item and the quantity limitations for each item.** Unless you have been instructed otherwise, please adhere to the quantity limitations provided on this sheet.
2. You will now step through the shopping process, item by item. For each item, your routine will be the same. Let's use couches as an example:
    1. You will tell the client what item you will be reviewing. "Let's look at couches next."
    2. The Shopping Flow tells you that couches are found under the item class of seating. On the Item screen, in the Item Class' drop-down box, select 'Seating". In the 'Item Type' drop-down box, select 'Couch/Sofa". The couch inventory will be displayed on your laptop.
    3. Tell the client the quantity restriction noted on the Shopping Flow sheet. "You may choose any combination of a couch and a loveseat."
3. When you and the client first start looking at the inventory, explain the following to the client:
    1. You will be scrolling left/right to review all the items.
    2. Make sure you read the descriptions underneath each item.
    3. If you want to see an item closer, we will click on the image. To return to the normal view, click on the 'x' in the upper right-hand corner of the picture.
    4. Some items have multiple pictures to give you different views or a close up of upholstery, etc. If multiple views are available, you can see them by clicking on the image.

4. When the client finds an item they would like, add the item to the client's cart by pressing the green "Add to Cart" button under the item they have chosen.
5. If the client wants an item removed from their cart, select the green "Remove from cart" button under the item. This will return the item to the general inventory. *Note: If you find that you need to select "Unpick Item" before picking "Remove from Cart", that means a fellow volunteer has already physically picked that item and therefore you need to tell them to put it back on the floor.*
6. You will repeat this process for each category.
7. If the vehicle(s) is getting full (60%+) at any point during the process, you will need to revisit the client's priorities. You may suggest they skip over several of the categories and focus on the items most important to them. Ask them which of the selected items in their cart are the lowest on their list so that you may tell the in-store movers this information.
8. At any point, you may click on the cart in the upper right-hand corner of the Items screen to see the contents of the client's cart. It is important to review with the client what is in their cart a few times throughout the process to ensure that there is no miscommunication about their choices. You are, however, not showing them their cart so they can change their mind or try to revisit the whole process!

Reconciling of Information

1. After all the furniture and before moving on to the lamps and artwork, the personal shopper should reconcile with the client the furniture that has been selected by show
2. Show them the contents of their cart. Once you get their approval that what is in their cart (which is the bulk of the shopping) appears correct, click on the "Ready to Load" button on the bottom of the Client Info screen. This enters your client into the waiting queue for the movers. The client's name will show on the screen near the loading dock. Tell your client that a volunteer mover will at some point come to tell them where to move their vehicle when it is their turn.
3. Complete the shopping for the last few categories with the client.
4. Show the client their shopping cart one last time. Thank them for the opportunity to help them today. Ask them to wait outside for their turn loading.
5. Confirm with the movers that they are aware of your client's presence on the loading list (especially if it is a slower day and they are occupied with other tasks).

Completing the Process

1. Go into the client's cart and click on the orange 'Mark Picked-up' button below the Target gift card (if applicable).
2. When the volunteers who are selecting linens and housewares are done with their respective jobs, they will give the shopper their completed wish lists.
3. Using the **Linens Wish List**, complete the categories under the 'Linens' item class by entering the following items to their cart:
    1. For Item Type 'Bag/Box Misc Linens', enter 2 for the average family and select 'Add to Cart'

    1. For Item Type ‘Blankets’, ‘Comforters’, ‘Pillows’, ‘Sheets’, and ‘Towels’, enter the number on the wish list and select ‘Add to Cart’
4. Using the **Kitchens Wish List**, complete the categories under the ‘Kitchen’ item class by entering the following items to their cart:
    1. For Item Type ‘Bag/Box Misc Kitchen’, enter 2 for the average family and select ‘Add to Cart’
    2. For Item Type ‘Frying Pan/Skillet’, ‘Glasses’, ‘Pots’, and ‘Silverware/Flatware’, enter the number on the wish list and select ‘Add to Cart’
5. Now go into the client’s cart and for each of those kitchen and linens items that you have just put into their cart, click on the orange “Mark Picked-up’ button.
6. Note: The above steps should be done when the movers are not actively working on the client (or done quite quickly while they are!). You do not want to muddy the waters by having the movers think that an item, like a blanket, is in the client’s cart but has not been picked up yet. The movers expect that the # of items selected vs. # of items picked will be equal when they complete the client loading.
7. Add a note about the family. Click on the green “Add Note” button below the notes on the Client Info screen. A pop-up box will appear. List the family members, including the children's names, ages, and genders. This information is not included in the referral so it is good to document. Include any comments about their mattress needs, vehicle for transport, refused items, and any space limitations on the vehicle. Type your note in the box and hit enter.
8. Once the personal shopper is confident that all of the client’s items have fit into their transport vehicle(s) and they have left the loading area, the shopper may close the client's order by clicking on the red ‘Close Order’ button on the bottom of the Client Info screen.
9. If the client completed their shopping on this visit, the shopper may close the referral by clicking on the red ‘Close Referral’ button on the top of the Client Info screen.
10. Staple together the check-in sheet, the Release, the linens wish list, and the kitchen wish list. File this group of formsin the file cabinet next to the front desk under the appropriate year.

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