

7-31-2013

Visual Merchandising Handbook: Translating Theory to Practice - Lab Guide

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Norris, Meghan E., "Visual Merchandising Handbook: Translating Theory to Practice - Lab Guide" (2013). *Scholarly Publishing Services e-Books*. Book 4.

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Visual Merchandising Handbook: Translating Theory to Practice

Lab Guide

Meghan E. Norris, PhD

**Purdue Scholarly Publishing Services
West Lafayette, Indiana**

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Introduction

Welcome to the world of Visual Merchandising!

Visual merchandising is a field that began as display, where the sole focus was to create visual appeal. However, merchandising is much more than making something look nice. Indeed, authors now explicitly recognize that merchandising serves the primary goal of assisting store sales, and thus merchandising directly impacts store features including design, signing, merchandise placement, and ultimately store image (Bell & Ternus, 2011).

In order to be successful in merchandising, students must have interdisciplinary academic knowledge and skills, in addition to practical knowledge and skills that exist outside of the classroom. The goal of this manual is to bridge the academic fields of visual merchandising and consumer behavior with practical skill development in order to facilitate insights and best practice for evidence-based in-store decisions that will meet the ultimate visual merchandising goal: increasing sales.

This manual is geared towards entry-level students in visual merchandising and was developed at Purdue University to support the CSR 323 course. It is intended to complement and support course lectures and field trips to local businesses to help foster crucial connections among important academic and applied concepts. The following textbooks are suggested as complementary readings.

Bell, J. A., & Ternus, K. (2011). *Silent selling: Best practices and effective strategies in visual merchandising* (4th ed.). London: Fairchild .

Cialdini, R. B. (2001). *Influence: Science and practice*. Boston: Allyn & Bacon.

Lab 1: A Merchandising Disaster

As you will learn from working through this manual, visual merchandising is a consequential field in retailing. Both ***quantitative and qualitative*** research shows that visual merchandising has a direct impact on consumer behavior, and has the ability to increase sales.

This lab has two parts. The first part will have you read a short peer-reviewed journal article about visual merchandising. This is intended to give you evidence-based insights into merchandising.

Although the focus is generally on how to create compelling displays, the second part of the current lab will guide you to find examples of merchandising “gone wrong” so that you can learn from past mistakes.

Recognize that professionalism is paramount in this field. As a result, all assignments will require careful attention to formatting. You are provided with a sample cover page in the appendix and should use APA (American Psychological Association) referencing style. A useful and accessible guide to APA style can be found at <http://owl.english.purdue.edu/owl/resource/560/01/>.

Laboratory 1 Instructions

Merchandising is **important!** Professionalism is **paramount!** This lab is intended to get you started on your path to merchandising expertise.

This lab has the following **Skill Development** goals. It will:

1. Give you practice with formal writing using APA style
2. Give you practice searching for evidence-based information and presenting it in a professional manner
3. Give you practice in critical thinking

This lab has the following **Knowledge Development** goals. It will:

1. Provide an evidence-based understanding of the importance of merchandising
2. Provide insights into consequences of merchandising gone wrong
3. Provide you with a go-to example of merchandising gone bad to store away for future knowledge

Instructions: You will create a word-processed document for submission to your Teaching Assistant (TA) at the end of the lab. Be sure that a title, your name, course, affiliation (university or company name) and the date are on a cover page. Also ensure that you have page numbers, including your last name beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

Part 1:

Read the following paper. You can find it in your library or by pasting the title into the *Google Scholar* search engine.

Kerfoot, S., Davies, B., & Ward, P. (2003). Visual merchandising and the creation of discernible retail brands. *International Journal of Retail & Distribution Management*, 31(3), 143–52.
<http://dx.doi.org/10.1108/09590550310465521>

1. In one paragraph, explain the purpose of visual merchandising and why it is important for retailers. Give some citations to back yourself up! (Hint: use the paper you were asked to read). Demonstrate that you are able to use APA formatting to cite.
2. In one paragraph, explain whether there is more to visual merchandising than the common misconception of just making something look pretty. Back yourself up!

Part 2:

3. Go online and search for an example of merchandising or promotion that failed to achieve its goal. Give a brief overview of the situation (not your opinion, yet), and include a reference to the example you are choosing, and include the picture if available.

4. Explain why you think your example is an example of failed merchandising. What were the implications? How many sales were lost? Did evaluations of the store change? Do you have evidence to back up your opinion?

5. You don't have much background yet to make informed suggestions for improvement, but intuitively what would you change? (1–3 sentences)

Grading Scheme:

Cover Page: 1

Page numbers with name included: 1

References included: 1

Reference Page: 1

APA format: 1

Explanation of visual merchandising: 2

Debunking common misconceptions: 2

Example of merchandising gone wrong: 2

Insights into what went wrong: 2

Suggestions for improvement: 1

Total: 14

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it. This will be a challenging lab to complete in 2 hours. Do your best!

Lab 2: Integrating Creative and Critical Thinking in Research on Color: Understanding the “Science” in Merchandising

Visual merchandisers face a challenge in bridging the gap between creative and critical thinking. Both creative and critical thinking are necessary components for developing successful merchandising campaigns. Good merchandisers not only make products look good, but they also know what makes consumers tick, and what will create a compelling purchasing context.

Sometimes the word “science” can be intimidating, especially if you haven’t taken any science or statistics courses. Recognize that science is not necessarily conducting chemistry experiments, but rather following the scientific method. The scientific method consists of “systematic observation, measurement, and experiment, and the formulation, testing, and modification of hypotheses” (Oxford Dictionary, 2010). In other words, in science we systematically search for causes of, and explanations for, events. In the science of visual merchandising, a researcher might search for the causes that lead to shoppers entering a store. A good applied merchandiser will find scientific resources to support their merchandising decisions that follow this method.

As you saw from the last lab, merchandising gone wrong can be disastrous for products, brands, and stores. Before you make a merchandising decision, you should do careful background work to see if research evidence supports your design plan. This not only limits preventable merchandising mistakes, but also provides you a safety net for when a campaign goes wrong. You should always be able to justify your merchandising decisions in a credible way, demonstrating your expertise in the area and your trustworthy background work.

Throughout this manual you will be introduced to evidence-based findings that will help you in your merchandising. This lab is intended to teach you the basic skills needed to understand and apply the tool of science in your work, linking it with creativity, so as to create the most compelling displays.

Laboratory 2 Instructions

When it comes to using color in merchandising, it seems everyone is an expert, but not everyone has evidence to support his or her opinions. There is a lot of research on *when* and *why* color can boost sales, but people always seem to think that they know better. This lab requires you to think critically about peer-reviewed research on color, and will then require you to creatively apply the research to merchandising concepts.

This lab has the following **Skill Development** goals. It will:

1. Give you practice with critical thinking
2. Give you practice reading academic, scholarly, evidence-based work on the effects of colors
3. Give you practice articulating what you learn from academic, scholarly, evidence-based work on the effects of colors

This lab has the following **Knowledge Development** goals. It will:

1. Provide an understanding how evidence-based conclusions and personal opinion can be very different
2. Provide you scholarly evidence for the effects of color in merchandising
3. Provide experience with defending judgments based on evidence, rather than opinion

Remember, common sense isn't so common!

Instructions: You will create a word-processed document for submission to your Teaching Assistant (TA) at the end of the lab. Be sure that a title, your name, course, affiliation (university or company name) and the date are on a cover page. Also ensure that you have page numbers, including your last name beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

Part 1:

Please answer the following questions as honestly as possible based on your opinion. You do not have to cite reasons in part 1:

1. Why is color important in merchandising?
2. What do you think the best colors to use in any display are? Why?
3. What do you think the worst colors to use in any display are? Why?

Part 2:

Please pull up the following journal article. One way to do this is to put the title into the *Google Scholar* search engine.

Kaya, N., & Epps, H. H. (2004). Relationship between color and emotion: A study of college students. *College Student Journal*, 38(3), 396–405.

Part 3:

When you have finished Parts 1 and 2, complete the following. This is not based on your opinion, but rather your ability to communicate and apply the intent and conclusions of the journal authors.

1. What was the problem that the researchers were addressing in this paper?
2. Why did the authors do the research?
3. What did they find?
4. Did the authors conclude that a certain color is *always* best? Why or why not?
5. How can visual merchandisers apply this academic article? Why is this paper important for merchandisers?
6. In what ways did the authors support their conclusions?
7. If you were developing a sales-assistive merchandising plan, how would you use what this study teaches us?

Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Opinions: 1

Overview of the problem: 3

Why did the authors do it: 3

Conclusion interpretation: 2

Overview of findings: 2

How can merchandisers apply: 3

How would YOU use this: 2

Overall professionalism/grammar: 1

Total: 22

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Lab 3: First Window (Understanding Service Learning)

Being credible in merchandising means that you are an *expert* and you are *trustworthy* in your knowledge and skills in merchandising (Hovland, Janis, & Kelley, 1953). As a result, the first goal of this course is to teach you the academic content related to creating successful displays. The second goal is to teach you to effectively apply the knowledge to creating displays.

Although it is very early in the semester, we are going to jump right in and get your feet wet, teaching you how to translate academic content knowledge into effective window display. Don't worry if you are not yet confident in your knowledge. We will be doing a very similar assignment again later in the term once you have more content under your belt. The purpose of this assignment is to begin facilitating connections between your academic and applied knowledge and skills, and to teach you the value of service learning.

The following information is to help guide you in this assignment. You can also see Cialdini, 2001 for more ideas.

Social influence is an area of research that focuses on how an individual's behaviors, thoughts, and emotions can be impacted by another person (Norris & Fabrigar, 2012). Augmenting the efforts of a sales associate, visual merchandising can play the role of an influencer in a merchandising context. Indeed, many of the principles of social influence directly translate into visual merchandising.

Social influence research is generally discussed in four categories: conformity, compliance, obedience, and persuasion. Compliance is when an individual changes their behavior in direct response to a request. Examples using compliance in merchandising include messages of "shop here!" or "buy now!" which are direct requests. Conformity is when an individual adjusts their behaviors, thoughts, and emotions to fit in with a group norm. Conformity can take place in merchandising if a shopper buys an item because "everyone has it!" Obedience is when an individual changes their behavior in direct response to a request from an authority figure. Examples using obedience in merchandising include experts such as medical doctors telling consumers to buy a certain health-related product. Persuasion is when there is an active attempt to change an individual's attitudes, beliefs, or emotions with no immediate change in behavior (although immediate behavior change could be possible). An example of persuasion being used in merchandising is when an item is being re-branded, and retailers provide shoppers with a communication about new product features. See Norris & Fabrigar, 2012 for a detailed list of social influence research.

There are specific motivational goals that are important for merchandisers to understand that come from the field of social influence. Understanding motivational goals of consumers allows merchandisers to tailor campaigns to match and satisfy those consumer goals. Cialdini and Goldstein (2004) provide this information in academic detail, but the following section provides a quick-guide for selecting a merchandising strategy.

Goal of Accuracy: If your consumer is motivated to be *accurate*, the following are a few appropriate techniques: affect and arousal (Forgas, 2001), That's-Not-All (Burger, 1986), Disrupt-then-Reframe (Davis & Knowles, 1999), authority (Milgram, 2004), social norms (including social proof) (Deutsch & Gerard, 1955), and scarcity (Lynn, 1991).

Goal of Affiliation: If your consumer is motivated to *form relationships and bonds*, the following are a few appropriate techniques: reciprocity (Gouldner, 1960); liking (Burger, Soroka, Gonzago, Murphy, & Somervell, 2001); door-in-the-face (Cialdini, Vincent, Lewis, Catalan, Wheeler, & Darby, 1975); and behavioral mimicry (Chartrand & Bargh, 1999.)

Goal of Maintaining a Positive Self-Concept: If your consumer is motivated to *look and feel good on the inside and/or outside*, the following are a few appropriate techniques: foot-in-the-door (Burger, 1999); commitment & consistency (Cialdini, Trost, & Newsom, 1995); and majority influence (Latané & Wolf, 1981).

Laboratory 3 Instructions

Our department does wonderful things, but not everyone knows it. This is especially true with respect to activities in service learning. This lab is intended to get you started on your first hands-on window experience in a team, and provide insights into service learning.

KEY LESSON: A window is ONLY “good” if it conveys the intended message to the intended audience. If it conveys unintended messages, especially negative ones, the window has failed.

*This lab will take place over **TWO** weeks to give you enough time to do a proper job. You may have to put in some time outside of class time to do this in a professional manner.*

This lab has the following **Skill Development** goals. It will:

1. Give you practice with creative, evidence-based thinking
2. Give you practice communicating conceptual ideas on paper either by drawing, computer-assisted diagrams, or sketches with added text to assist communication
3. Give you practice with teamwork

This lab has the following **Knowledge Development** goals. It will:

1. Provide an understanding of the importance of space planning
2. Provide insights into key window considerations
3. Provide experience with considering a budget

Instructions: You will create two documents as team for submission to your TA at the end of the lab the second lab session. The first document is a word-processed document, the second document is a drawing/sketch/image. Be sure that a title, your names and the date are on a cover page. Also ensure that you have page numbers, including your last names (or a team name) beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

You will be assigned a service learning based event/topic, a window, and a date. This window and event will be “yours”.

Windows will either focus on student service-learning engagement activities, faculty service-learning engagement activities, or departmental service-learning activities. The goal of the window is to promote and educate about service-learning.

You will be designing, drawing, and building a window to highlight that event. Today, you will focus on the first two. As a team, develop a concept for your window. Be sure that it speaks to your target audience!

1. In your word-processing document, fill out the Window Display Preparation form found on the following pages.

2. Create a drawing, sketch, or computer graphic of your window plan. You can use added text to convey concepts, but this should be image based. You will not be graded based on artistic abilities, but rather ability to communicate your idea in image form. Use color!

When you receive instructor permission, you can build your window on the date assigned to you.

Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Audience Considerations: 5

Window Considerations: 4

Display Overview: 5

Troubleshooting: 3

Budget: 2

Sketch: 3

Overall professionalism/grammar: 3

Window Execution: 4

Total: 34

You can redo the written portion of this assignment for re-grading, but you cannot redo your window. If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Window Display Preparation

Window Location: _____

Event/organization/product to be promoted:

Audience Considerations:

Target Audience Age Range: Provide evidence!

Target Audience Typical Lifestyle (e.g., students, upper-management, sport enthusiasts): Provide evidence!

Target Audience Likely Goals (i.e., affiliation, positive self-concept, accuracy): Provide evidence!

Target Audience Likely Processing Style (e.g., systematic versus heuristic): Provide evidence!

Concept being selected with considerations of target audience likely goals and processing style to ensure a compelling message and why (e.g., commitment/consistency, reciprocity, similarity, familiarity, scarcity, authority, social proof):

Window Considerations:

Dimensions: ____ wide ____ high ____ deep

Lighting: specify type, number and location within the window

Physical features of window: specify flooring, walls and ceilings. Carefully note any concerns (i.e., poor condition of any aspect of the window that will need special attention).

Cleanliness: Specify the current state of the window, and what will need to be done to get it show-ready. Also note any specific cleaners you will need, such as window cleaner.

Display Overview: With your evidence-based audience and window considerations in mind, you can plan your display.

Goal of the display:

Overview of planned display (i.e., a summary of what your window will include and look like)

Color theme to be used, and identification of major colors, (e.g., warm/cool, complementary/ analogous). Include a computer-generated swatch by adding a shape and selecting appropriate fill colors):

Identify and explain use of elements of design (e.g., unity, harmony, balance, repetition, rhythm, emphasis, contrast, and surprise):

Justification of chosen concepts based on target audience, goals, and display. Back yourself up with citations! Remember, a project gone wrong can be very costly. You always want to have support for your decisions.

Troubleshooting:

Ways individuals could misconstrue the message being displayed in a negative way:

Is the risk acceptable, if not provide ways of preventing misconstrual:

Window concerns that need attention, including proactive solutions (i.e., theft, vandalism):

Budget:

Give an overview of the cost required to create your window. If you have items available to you for free, great! Ensure you know your budget maximum, and ensure costs are reasonable. You will be rewarded if you can create a professional-looking window for free. You can include \$0. Example:

Item	Cost	Availability
Fishing line (handing signage)	\$1.00	Dollar store
Bristol board	\$1.00	Dollar store
Old cell phone	\$0	Have old phone no longer in use

Lab 4: Intro to Google SketchUp

Store layout is an important concept for merchandisers. You are responsible for knowing how and why a certain layout will lead to increased sales. The merchandising field has done a great job at identifying floor layouts to correspond with certain types of shops. However, as you know, merchandising is more than just hardware and layout. The field of environmental psychology sheds further important insights into shopping behaviors and traditional movement patterns. Interestingly, men and women navigate differently. Men tend to use more Euclidean strategies in navigation such as North-South, whereas women tend to use more landmark and left-right based navigation strategies (Dabbs, Chang, Strong, & Milun, 1998). Additionally, elderly individuals tend to use North-South-East-West directions to a greater degree than younger individuals (Dabbs et al., 1998). Thus, it is important to consider your typical consumer when designing directional signage and floor layout.

The current lab will encourage you use important layout and design concepts, and to additionally think about the navigation style of a target shopper in a specific type of store. In this lab, you will design a floor layout to meet the needs of a particular shopping experience. You will do this on the free version of Google SketchUp, providing you with skills you can take with you to any employer.

As demonstrated in Bell & Ternus (2011), there are six floor layouts that are most common. These are briefly referenced below to provide you with a quick-guide to help get you started.

The **grid layout** places fixtures in a linear pattern, with aisles that run vertically and horizontally. This is a very efficient layout. The ends of aisles are focal points in this layout.

The **free-flow** layout places fixtures in an unstructured, informal pattern that encourages browsing.

The **race-track layout** includes a large aisle around the perimeter of a store similar to a car race-track, with departments to the left and right of the perimeter aisle. This layout exposes consumers to a great deal of merchandise.

The **soft-aisle layout** has fixtures arranged into groups with a 5-foot aisle along merchandised wall sections. The walls are the most important sales-generating areas in this layout.

The **minimal floor layout** is known for its use of few fixtures. Merchandise is generally presented dramatically, similar to artwork in a gallery.

The **combination floor layout** uses elements from all layouts to achieve the retailer's goals.

Also important to consider are the fixtures that might be included in a floor plan. Here is a quick reference guide for floor fixtures. See Bell & Ternus, 2011 Chapter 4 for details:

Round Rack: Also called a rounder, these capacity fixtures are often used to hold broken assortments of merchandise, and are often seen containing sale merchandise. The height of a round rack is often adjustable, and the diameter can vary in size.

Superquad: A capacity fixture with four adjustable arms. These fixtures work well for displaying coordinating merchandise.

Gondola: A four-sided capacity fixture that can contain both shelves and rods.

Endcaps: The ends of gondolas which can highlight merchandise held within the gondola, or other merchandise of importance. Endcaps can be either pegged or shelved.

Two-way Fixture: Also called a T-stand, these fixtures have two arms and can hang small amounts of trend or test merchandise.

Four-way Fixture: These fixtures, also called costumers, have four arms, and can hold coordinating pieces.

Laboratory 4 Assignment

Merchandisers not only need to know how to create compelling displays based on reliable visual and psychological principals, but they also have to have some knowledge of architecture. This lab will give you a chance to demonstrate your ability to design and create a floor layout.

This lab has the following **Skill Development** goals. It will:

1. Give you experience with Google Sketch-Up, a free software program
2. Give you practice applying textbook concepts to real-world programs

This lab has the following **Knowledge Development** goals. It will:

1. Reinforce the importance of careful consideration target consumer when choosing layout
2. Provide an understanding of basic architectural symbols
3. Provide insights into navigation strategies

Instructions:

You will create a word-processed document for submission to your Teaching Assistant (TA) at the end of the lab. Be sure that a title, your name, course, affiliation (university or company name) and the date are on a cover page. Also ensure that you have page numbers, including your last name beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

SketchUp Hint

You will need the following icons:



Your TA will give you a small overview of how to use Google SketchUp. Following this, you will complete the following tasks:

1. Come up with a hypothetical store. Give a brief description of product sold (price point, big ticket items, exclusive items, etc.), typical shopper (e.g., demographics, shopping style (browser taking time, power shopper, likely goal {affiliation, accuracy, self-presentation}, etc.) and size of store (make an informed decision on floor space size—you might have to do some research on this).
2. Choose a layout (e.g., racetrack, grid) and give a 2-sentence justification for why this floor layout is best for your store (remember to cite!)
3. Consider how humans navigate. Give a short overview of how you would integrate this navigation knowledge with a floor layout to maximize consumer comfort.
4. Use SketchUp to design your floor plan. This does not need to be fancy, but in your shop you should have double walls, windows, and a door.
5. You should consider fixture placement. If you need a fitting room/back room/cashier, be sure those are included! Think carefully. Should fitting rooms go directly in front of a window or door?
6. You DO NOT need to include pictures of product. You will have described it earlier to show that the nature of your product being sold matches your chosen layout.
7. Your floor layout should match the retailing goals of your shop.

Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Description of store: 2

Layout choice & justification: 3

Navigation strategy consideration: 2

SketchUp Image (double walls, windows, etc.): 3

Overall professionalism/grammar: 1

Total: 16

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Lab 5: Window #2 Service Learning Engagement

As promised, you get another chance to work on a window. This time, you have added professional responsibilities.

Service learning, according to the National Service-Learning Clearinghouse (n.d.), is an approach to learning that strives to integrate meaningful community service with traditional classroom learning to enrich learning, foster student civic responsibilities, and strengthen communities. Thus, service learning is not merely engaging in community service, but rather fostering translation between scholarly learning, and community application for the greater good. Service learning initiatives have been shown to have numerous positive student learning outcomes including development of personal efficacy, leadership, communication, and sense of social responsibility (see Eyler, Giles Jr., Stenson, & Gray, 2001 for a comprehensive review). We will be translating the knowledge and skills learned so far to a service-learning project to not only benefit the community, but also to foster professional skills in a real world environment.

In class, you will be identify local non-profit organizations that you wish to work with. Your instructor will contact the organizations to see whether they will be willing to engage in a project where students will design and create a window display promoting that organization. Once a list of cooperating organizations has been created, you will then sign up to work with one organization.

In addition to your work with an organization, you will also engage in reflection of your experiences. Indeed, a fundamental component of service learning is personal reflection (Eyler, 2001). According to scholars, reflection in service learning allows for deeper learning among academic, social, moral, personal, and civic dimensions (Hatcher, Bringle, & Muthiah, 2004, p. 39). Demonstrating the importance of reflection, students who engaged in reflection as a component of service learning reported greater learning as a result of the project (Eyler, Giles, & Schmiede, 1996).

Laboratory 5 Assignment

Your second window/final project will be very similar to Window 1, only this time you will be engaging directly with not-for-profit organizations. You are tasked with understanding the organization, their display outcome goals, and their target audience.

*This lab will take place over **THREE** weeks to give you enough time to demonstrate your expertise. You **WILL** have to put in some time outside of class time to do this in a professional manner.*

This lab has the following **Skill Development** goals. It will:

1. Give you real world practice with creative, yet evidence-based, thinking
2. Give you practice communicating with real world organizations, and confirming conceptual ideas on paper either by drawing, computer-assisted diagrams, or sketches with added text to assist communication between you and your organization
3. Give you practice translating ideas and sketches into positive, impactful displays
4. Give you an opportunity to demonstrate professionalism through team interaction with an organization

This lab has the following **Knowledge Development** goals. It will:

1. Provide an understanding of the importance of space planning
2. Provide insights into key window considerations
3. Provide experience with considering a budget
4. Provide insights into job requirements of a merchandiser
5. Provide insights into connections among theory, practice, and yourself

Instructions:

1. Sign up for a team (in class).
2. As a team, do background research on your organization (see the following forms).
3. Create and send a professional, introductory email to the contact you have been provided.
4. Set a meeting either by phone, email, Skype, or in person so as to adequately do background prep. Remember, be professional!
5. Complete the Window Display Preparation form based on your research and your organization's input, and complete a sketch. Once you have professor approval, have these sent to your contact for organization approval.
6. Complete your test window on campus during your assigned date. Once you have professor approval, photograph this window, and send it to your organization for approval.
7. Complete your journal entries, and hand them into the TA at the end of each lab time (found below the Window Display Preparation).
8. Once you have organization approval, set a date and to travel to the organization as a team to complete your full window (get instructor permission for travel beforehand!).

When you receive instructor permission, you can build your window on the date assigned to you.

Grading Scheme:

Cover Page: 2

Page numbers with names included: 3

References included: 5

Reference Page: 5

APA format: 5

Audience Considerations: 20

Window Considerations: 15

Display Overview: 20

Troubleshooting: 15

Budget: 20

Sketch: 30

Reflections: 30

Overall professionalism/grammar: 100 (based on feedback from your organization and teammates)

Window Execution: 40

Total: 310

You cannot redo this assignment.

Window Display Preparation

On-Campus Window Location: _____

Community Window Location (if applicable): _____

Event/organization/product to be promoted:

BEFORE SPEAKING WITH THE CLIENT, DO BACKGROUND RESEARCH. Use your background research to guide questions asked of your organization:

Audience Considerations:

Target Audience Age Range: Provide evidence!

Target Audience Typical Lifestyle (e.g., students, upper-management, sport enthusiasts): Provide evidence!

Target Audience Likely Goals (i.e., affiliation, positive self-concept, accuracy): Provide evidence!

Target Audience Likely Processing Style (e.g., systematic versus heuristic): Provide evidence!

Concept being selected with considerations of target audience likely goals and processing style to ensure a compelling message and why (e.g., commitment/consistency, reciprocity, similarity, familiarity, scarcity, authority, social proof):

On-Campus Window Considerations:

Dimensions: ____ wide ____ high ____ deep

Lighting: specify type, number and location within the window

Physical features of window: specify flooring, walls and ceilings. Carefully note any concerns (i.e., poor condition of any aspect of the window that will need special attention).

Cleanliness: Specify the current state of the window, and what will need to be done to get it show-ready. Also note any specific cleaners you will need, such as window cleaner.

Organization Window Considerations:

Dimensions: ____ wide ____ high ____ deep

Lighting: specify type, number and location within the window

Physical features of window: specify flooring, walls and ceilings. Carefully note any concerns (i.e., poor condition of any aspect of the window that will need special attention).

Cleanliness: Specify the current state of the window, and what will need to be done to get it show-ready. Also note any specific cleaners you will need, such as window cleaner.

Display Overview:

With your evidence-based audience and window considerations in mind, you can plan your display.

Goal of the display (The goal should come directly from your client):

Overview of planned display (i.e., give a summary of what your window will include and look like)

Color theme to be used, and identification of major colors, (e.g., warm/cool, complementary/ analogous). Include a computer-generated swatch by adding a shape and selecting appropriate fill colors):

Identify and explain use of elements of design (e.g., unity, harmony, balance, repetition, rhythm, emphasis, contrast, and surprise):

Justification of chosen concepts based on target audience, goals, and display. Back yourself up with citations! Remember, a project gone wrong can be *very* costly. You always want to have support for your decisions.

Troubleshooting:

Ways individuals could misconstrue the message being displayed in a negative way:

Is the risk acceptable, if not provide ways of preventing misconstrual:

Window concerns that need attention, including proactive solutions (i.e., theft, vandalism):

Budget:

Give an overview of the cost required to create your window. If you have items available to you for free, great! You are working with an organization, and staying within budget is paramount. You can include \$0. Example:

Item	Cost	Availability
Fishing line (handing signage)	\$1.00	Dollar store
Bristol board	\$1.00	Dollar store
Old cell phone	\$0	Have old phone no longer in use

Lab 5 Weekly Reflections

Every Friday after lab for the duration of this project, answer the following questions. This will allow you to track your insights as they develop over the project. Your answers do not need to be long, but they should be indicative of thoughtful reflection. You can use bullet-point form to answer these questions, and you do not need full sentences. The goal is to make connections between yourself as a professional and the applied, evidence-based work that you are conducting. ***These are due the Friday following the execution of your final window for the organization.***

Beginning Questions (Answer at end of first service-learning lab):

1. What are the strengths and weaknesses of working in a team for this project?
2. What are the challenges you see in terms of working with your organization over the coming weeks?
3. What are the long and short-term benefits that this project could have for your organization?
4. What do you individually hope to gain from working on this project?
5. Anything else?

In Progress Questions (Answer end of each lab/group session until project is finished):

1. What has been the biggest challenge so far working on this project?
2. What has been the biggest reward so far working on this project?
3. What are ways that you can overcome challenges that are popping up?
4. Are you progressing towards reaching your individual goal from Week 1? If so, what has facilitated that goal? If not, what can change to help you come closer to reaching your goal?
5. What do you think the organization feels about the project progress so far?
6. Do you feel you are a good team player in this project so far? How can you be a better team player? (This is something all professionals should be consistently working on!)
7. Anything else?

Final Questions (Answer once your final window is complete):

1. Were you able to overcome challenges throughout this project? If so, how? If not, how might you handle them in the future?
2. What was the most rewarding part of this project?
3. What long and short-term benefits arose for the organization out of this project?
4. What long and short-term benefits arose for you out of this project?
5. Did you reach your desired personal gain from Week 1?
6. Anything else?

Lab 6: Creating a Planogram

Planograms are a standard in retailing and merchandising. As you can see in Bell and Ternus (2011), planograms are diagrams of specific store areas (e.g., a priority wall) that detail where each specific piece of merchandise is to go, the fixtures to be used, and any signage or props. Planograms help ensure consistency and quality among stores, providing retailers with the information needed to build specific displays.

If you've worked in retail, you might have experience building a display from a planogram. However, as a merchandiser your job will be to design a planogram, not just build one.

As you will see, from a merchandising perspective, planogram considerations are very similar to window considerations. For example, what is the goal of the wall being designed? Who is your target audience? What fixtures will you be using?

To help refresh your memory for planogram logistics, here is a quick reference guide for wall considerations (see details in Bell & Ternus, 2011):

Slatwall: A wall system that has horizontal panels with equidistant slots that hold brackets and accessories designed to fit in a slatwall system.

Gridwall: A wall system that is made of metal wire in a grid-like pattern that holds brackets and accessories designed to fit in a gridwall system.

Crossbar: Typically metal and 48" in length, crossbars are a basic wall fixture that are flat, run parallel to a wall, and can be used to hold the fixtures that display merchandise.

Crossbar Bracket: Typically metal and 3" on length, these brackets anchor crossbars to the wall.

Straight Arms: Typically metal and 12" in length, these fixtures can work on any wall system, or can hook onto crossbars. They run perpendicular to a wall. Merchandise is hung from these fixtures. Straight Arms can also be found on T-stands.

Waterfall: Waterfalls are slanted arms that display cascading merchandise. Waterfalls have bumps in the arm to prevent merchandise from sliding down.

Outriggers: decorative or functional elements mounted to a wall at right angles to break up a selling wall into smaller sections.

Soffits: a long ledge, permanent arch, or box that reaches down from the ceiling to the top of useable selling space. You only want to present one fashion statement under any one soffit.

Laboratory 6 Assignment

This lab has the following ***Skill Development*** goals:

1. Give you experience with sketching planograms
2. Give you practice applying classroom concepts to real-world merchandising requirements

This lab has the following ***Knowledge Development*** goals:

1. Reinforce the importance of careful consideration of the nature of products on priority walls
2. Provide an understanding of the necessary considerations for getting an idea to the wall

Instructions:

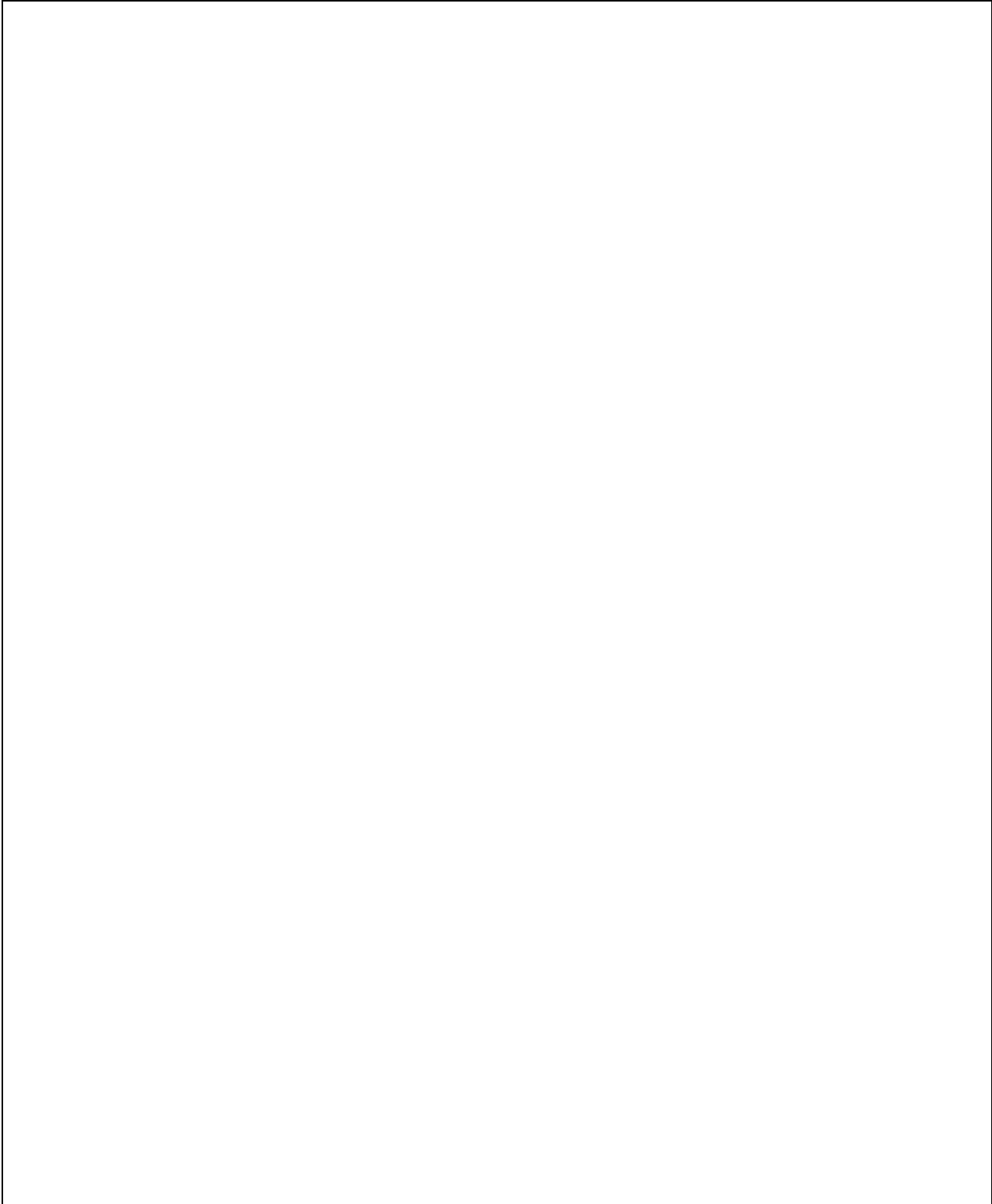
You will create a word-processed document for submission to your Teaching Assistant (TA) at the end of the lab. Be sure that a title, your name, course, affiliation (university or company name) and the date are on a cover page. Also ensure that you have page numbers, including your last name beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

In Lab 4, you gave an overview of a hypothetical store. You are going to use that overview again in this lab. In your new document for the current lab, copy and paste both your overview and your SketchUp image from Lab 4 into a new document.

Choose one priority wall from your SketchUp image. Give a description of the nature of the merchandise you would find on that wall, and the color story you would use. Defend your choices with information from the class! (I know that citing takes time and can be frustrating, but it's a necessary thing, even for experts! Be sure to cite properly!)

Using the form on the following page, draw your priority wall. Be sure to include color!

Pretend that sales associates will be implementing your planogram. Create a list of instructions for them so that they can create the wall as efficiently as possible.



Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Copy/Paste overview and image: 1

Identification of priority wall: 1

Description of merchandise: 3

Diagram of priority wall (color, approximately to scale): 5

Instructions for sales associates (e.g., which fixtures they will need, how many, type of wall, approximate distance between garments): 5

Total: 20

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Lab 7: Your Dream Window

Although merchandising typically involves teamwork. It is also important to develop your individual style. It is also important to practice evidence-based considerations in your creation style.

When you learned about Gene Moore, you saw his ability to create and generate beautiful displays. This is now your chance to demonstrate your ability to creatively apply course concepts to create a compelling diagram of a display!

Remember, the answer of "is the window good?" always depends on the answer "who is the window for?" and "what do you want it to do?"

Laboratory 7 Assignment

This lab has the following **Skill Development** goals. It will:

1. Give you practice sketching a window
2. Give you practice applying textbook and in-class concepts to windows

This lab has the following **Knowledge Development** goals. It will:

1. Reinforce the importance of careful consideration of message communication
2. Reinforce the importance of standard window considerations

Instructions: You will again submit 2 documents: a word-processed document, and a sketch/image. Submit them to your TA at the end of the lab. Be sure that a title, your name and the date are on a cover page. Also ensure that you have page numbers, including your last names beside the number. This is a key component of professionalism!

1. Give an overview of your imaginary store/organization. Give a brief description of product sold (e.g., price point, big ticket items, exclusive items, service, etc.), typical shopper (e.g., demographics, shopping style (browser taking time, power shopper, likely goal {affiliation, accuracy, self-presentation}, etc.)
2. Draw/sketch your window. Use color! This drawing should communicate your ideas clearly.
3. In your word-processing document, describe your window in detail. Explain why you chose the concepts, message, and materials you did. Be sure to back up your ideas with evidence.
4. Justify why you can expect your window to effectively promote your shop/organization. Back yourself up with citations! Remember, a project gone wrong can be very costly. You always want to have support for your decisions.

Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Overview of shop/audience: 3

Image: 3

Defense of concepts, message, materials: 5

Justification for expected effectiveness: 5

Overall professionalism/grammar: 1

Total: 22

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Lab 8: Creating Persuasive Signage

Your textbook details important practical considerations for signage layout (see Bell & Ternus, chapter 8). With practical knowledge on signing in hand, you can integrate what you know about social influence to create stellar persuasive signage.

In the context of this class, effective signage means that your intended message reaches your intended audience, and results in an intended behavior. Your task for this lab will be to create effective signage.

Throughout this course, and throughout this handbook, you have been encouraged to think about how depth of information processing and consumer goals can determine the nature of a display. Now, you will take those same concepts and apply them to signage. To help guide you, here are some key questions to ask yourself before you undertake this assignment:

- Is your audience likely to be systematically or heuristically processing? How does this influence the copy you choose (e.g., conversational, bullet-point, or product and price)?
- What is the goal of the intended audience (e.g., affiliation, self-presentation, accuracy)? How does this influence the copy and artwork you will include?
- How does your message satisfy the consumer goal?

Some guiding questions specific to the sign design:

- Where is the optical center of your sign? What message goes there and why?
- Do you want to use any creative copywriting?
- Does your sign have proper margins?
- Where is this sign likely to be posted?

Laboratory 8 Assignment

As you know, you are in an exciting program! Sometimes the people promoting the program or program events might not be doing so with evidence behind them. Your job is to create a compelling 1-page promotional sign for an event of your choosing that is happening in the program.

This lab has the following **Skill Development** goals. It will:

1. Give you practice creating promotional signage
2. Give you practice applying textbook and in-class concepts to signage

This lab has the following **Knowledge Development** goals. It will:

1. Reinforce the importance of careful consideration of message communication
2. Reinforce the importance of margins, optical center, etc. (see Bell & Ternus, Chapter 8)

Instructions:

You will again have 2 documents for hand-in: a word-processed document, and a sketch/image. Submit them to your TA at the end of the lab. Be sure that a title, your name and the date are on a cover page. Also ensure that you have page numbers, including your last names beside the number. This is a key component of professionalism!

1. In the word-processing document, give an overview of the *goal* of your signage. Is it to increase awareness? Enrollment? Attendance at events? Promote students? Something else?
2. Give an overview of your target audience (e.g., demographics, likely processing style, likely goals, etc.)
3. Create your sign either with computer or by hand
4. Explain why you chose the concepts, message, and presentation style you did.
5. Justify why you can expect your sign to effectively promote your program. Back yourself up with citations! Remember, a sign gone wrong can make your program look bad. When your program looks bad, *you* look bad.

Grading Scheme:

Cover Page: 1

Page numbers with names included: 1

References included: 1

Reference Page: 1

APA format: 1

Overview of goal: 3

Overview of audience: 3

Image: 3

Defense of concepts, message: 5

Justification for expected effectiveness: 5

Overall professionalism/grammar: 1

Total: 25

If you are unhappy with your grade, you have **one week** from its return to redo the assignment based on the feedback you receive to improve it.

Lab 9: Field Trip (Date and Time TBA)

We will be going to a local business for a field trip during a lab period.

This lab has the following ***Skill Development*** goals. It will:

1. Give you additional practice interacting with experts in the field of merchandising
2. Give you practice considering and applying textbook and in-class concepts to a real store

This lab has the following ***Knowledge Development*** goals. It will:

1. Reinforce the importance of careful consideration of target audience and message communication
2. Reinforce the importance of evidence-based decision making in the marketplace

Laboratory 9 Assignment

Your grade for this lab will be based on attendance.

Grading Scheme:

On Time Attendance

Total: 30

Lab 10: Reflections

As you saw from Lab 5, reflection is an important part of service learning. Reflection is not only important for service learning, but is important to learning more generally. For example, Dewey (1916) notes that reflection helps to make important connections between theory and practice. Further, Dewey suggests that experience is just as important as theory in learning.

The current lab steps back from our creative and critical thinking endeavors and focuses on *you* as a new, credible merchandiser.

Laboratory 10 Assignment

This term you gained experience in critical thinking, applying academic research to merchandising, designing store layouts and displays, building windows, and interacting with both not-for-profit organizations, in addition to for-profit businesses.

Today is a day for reflecting on what you have learned.

Instructions: You will create a word-processed document for submission to your Teaching Assistant (TA) at the end of the lab. Be sure that a title, your name, course, affiliation (university or company name) and the date are on a cover page. Also ensure that you have page numbers, including your last name beside the number. Effective written communication is a key component of professionalism, and any formal document should be well-presented.

Please answer the following:

1. What skills and knowledge have you gained that you did not expect to? What was your favorite part of this class? What aspects are you still unsure of? Is merchandising what you expected it to be?
2. The skills and knowledge you have learned in merchandising can serve you will in many careers. What is your career goal, and how can the skills and knowledge you learned in this class apply to your dream career?

Grading Scheme:

Cover Page: 1

Page numbers with name included: 1

Reflections: 11

Application to career goals: 11

Overall professionalism/grammar: 1

Total: 25

You cannot redo this assignment.

Appendix

Sample Cover Page

Norris, 1
Merchandising Disasters
Meghan Norris
Course Number: Visual Merchandising
Purdue University
August 1, 2014

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