



## PERSONAL SHOPPER *Job Aid*

Please review our process, laid out on the website at [www.95033.org/volunteer](http://www.95033.org/volunteer)

### DAY BEFORE SHOPPING DAY, WHEN YOU RECEIVE YOUR SHOPPING ASSIGNMENT(S)

1. Send a quick email confirmation to the coordinator that you've received your order(s).

### PREP WORK, CAN BE DONE EITHER ON SHOPPING DAY OR THE EVENING BEFORE

2. If you have more than one assignment, consider copy/pasting each order into a separate document (in MS Word/GoogleDoc, etc.).
3. Review each order:
  - a. Is this order to be picked up by the customer or to be picked up by a volunteer for delivery to the customer's home?
  - b. If the order will be picked up by a volunteer for delivery, is there a phone number provided? If not, email the coordinator for this.
  - c. Read each grocery store item - do you have any questions about what is requested?
  - d. If you have elected to copy/paste into separate document(s), this is a good time to group the shopping list by categories. Grouping into categories (and in approx. order of the Summit Store layout) will make your shopping experience much easier, see full example at end of this document.

Categories like:

1. FRUIT/VEGETABLES
2. FROZEN

3. BEVERAGES
  4. BREAD
  5. DAIRY (end of the first aisle)
  6. DRY GOODS
  7. SUNDRIES
  8. DAIRY (Last aisle)
  9. MEAT
  10. END-CAPS & HANGERS
- e. Review the # of orders you have to fulfill and make a general plan. It can take about 30 minutes in total to complete one order in the store. This takes into account the checkout process which can take 5-10 minutes (more on this later). Decide on a schedule that works best for you and write it down. For example: May 12th Shopping Plan
- 10am Arrive at Summit Store and shop for Customer 1
  - 10:30am Delivered to Customer #1's car
  - 10:35am Shop for Customer #2
  - 11:05 Delivered to Customer #2's car
- f. Call the customer to let them know you've received their order, "Hi, John! This is Jody and I am a volunteer with the Summit Store Personal Shopper Program. I will be fulfilling your order for tomorrow." Ask them any questions that you might have about the items they've requested. If it is later in the evening send the customer an email letting them know what time you will be shopping for them and follow suggestions below:
- i. *If they're picking up the order*, ask them if the time you've come up with and if it will work for them. Before you hang-up, let them know you will call/text them when the order is ready and they can pull up into a disabled spot and pop their trunk for you. Let them know that depending on how busy things are at the store, it may take you a bit longer than the time agreed upon.
  - ii. *If another volunteer will be delivering the order*, let the customer know that you'll be contacting that volunteer to schedule a time that works for your and the delivery driver's schedule. Let them know the delivery driver will call them to confirm the time/location for the grocery delivery.

THIS STEP SHOULD BE COMPLETED BY 10AM ON SHOPPING DAY.  
CUSTOMERS GET ANTSY WAITING TO HEAR...

- g. If another volunteer is delivering the order, call/text them next. You will be providing them with the name, address and phone number for the customer. Please be aware that you may be the first person to let them know about this order. Give them the timeframe that you'd like to schedule for the pick-up at the Summit Store and modify, as needed (same as customer, set up the time for when you think you will be done shopping). Ask them to call the customer to confirm the time that is planned for delivery and to ask the customer where the order should be left.

## SHOPPING

1. Make sure to print out the shopping list for each customer before you leave home. If you've created your own doc for each customer with the list sorted by category, it will be easiest.
2. Bring a pen/pencil so you can check-off items as you go along.
3. Consider your own health and safety and that of the customer for whom you're shopping for. Blue gloves are available inside the Summit Store, near the Produce. Use the hand sanitizer - which you will find at the door as you walk in.
  
4. If the customer has a meat order, you might consider stopping by and placing the order when you enter the store so it's ready for you when you get to the last aisle.
5. When you substitute or make a change to the shopping list, you can write next to the item what you did (i.e.: Customer asks for large box spinach, you might note: "only small bags of spinach available, got you 2.") This is not necessary but is a helpful and kind touch.
6. If an item isn't available, indicate this on your list so the customer knows it wasn't forgotten, it just wasn't available.

## CHECKOUT

1. Depending on who checks you out - it can take up to 10 minutes. Of course, the first thing is to let them know you're with a personal shopper program order. After the store clerk has checked out and bagged the items, they have to look-up your customer in their binder and then manually enter the customers' payment information. If you are willing to help bag for the clerk, tell them you'll handle it so they can look-up the customer in the binder and start processing payment while you are bagging. Not necessary, but kind and also cuts down the time.
2. Text customer or volunteer waiting that the order is almost ready. Wait for the receipt and ask them to staple the receipt to your order document so the customer gets your notes about substitutions, out-of-stock notes, etc.
3. Put the receipt in one of the bags.
4. Deliver groceries to the trunk of the customer or volunteer. Let them know their receipt is in one of the bags.

## NO TIPS PLEASE

Our volunteers should not accept any tips. If people want to support this program, please ask them to donate to Loma Prieta Community Foundation – [lpcf.org](http://lpcf.org)

## AFTER COMPLETION

1. Email your coordinator that the order(s) is/ are complete.
2. Enjoy a well earned few minutes of relaxation!