



Improve collaboration between store operations and leaders with apps in Microsoft Teams

Tailored solutions built for retail



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Contents

Connect corporate operations, store managers, and frontline workers in the flow of business with collaborative apps tailored for retail. Apps in Teams help everyone better meet the demands associated with virtual store support by connecting them to the information, expertise, and tools they need to collaborate and improve customer experiences all in one place.

Scenario

- Conduct a virtual store audit
 - Schedule and conduct a secure, interactive virtual store audit and assign post-audit follow up tasks.

For this scenario

- Scenario vision
- Primary persona
- Scenario storyboard
- Solution design best practices
- Solution architecture



Retail industry

Conduct a virtual store audit



Scenario vision

Context



Visual merchandiser (VM) Ambika oversees floor layout, inventory placement, brand alignment, and store cleanliness across several brick-and-mortar locations for Contoso Retail. She regularly audits individual stores to help ensure each one is upholding brand standards. In response to the Covid-19 pandemic, many of Ambika's audits are now virtual.



Store manager Aarav manages a Contoso Retail store that is being audited.

Current state

Virtual store audits are time consuming and not giving VMs the full picture.

- ⚠ To determine which store is next to audit, Ambika relies on a manually updated spreadsheet to track all the stores in her region.
- ⚠ She maintains a set of different spreadsheets for details on each store.
- ⚠ To conduct the audit, Ambika must call Aarav using her personal account on a video calling tool. When a question arises, she can't bring in someone from the merchandising team to help.
- ⚠ Ambika uses a consumer messaging service to assign Aarav follow-up tasks. For updates on task progress, she must send an ad-hoc email or text message.
- ⚠ Aarav is not notified when a new task is assigned and must remember to look up this information. Task assignments are often overlooked.

Future state

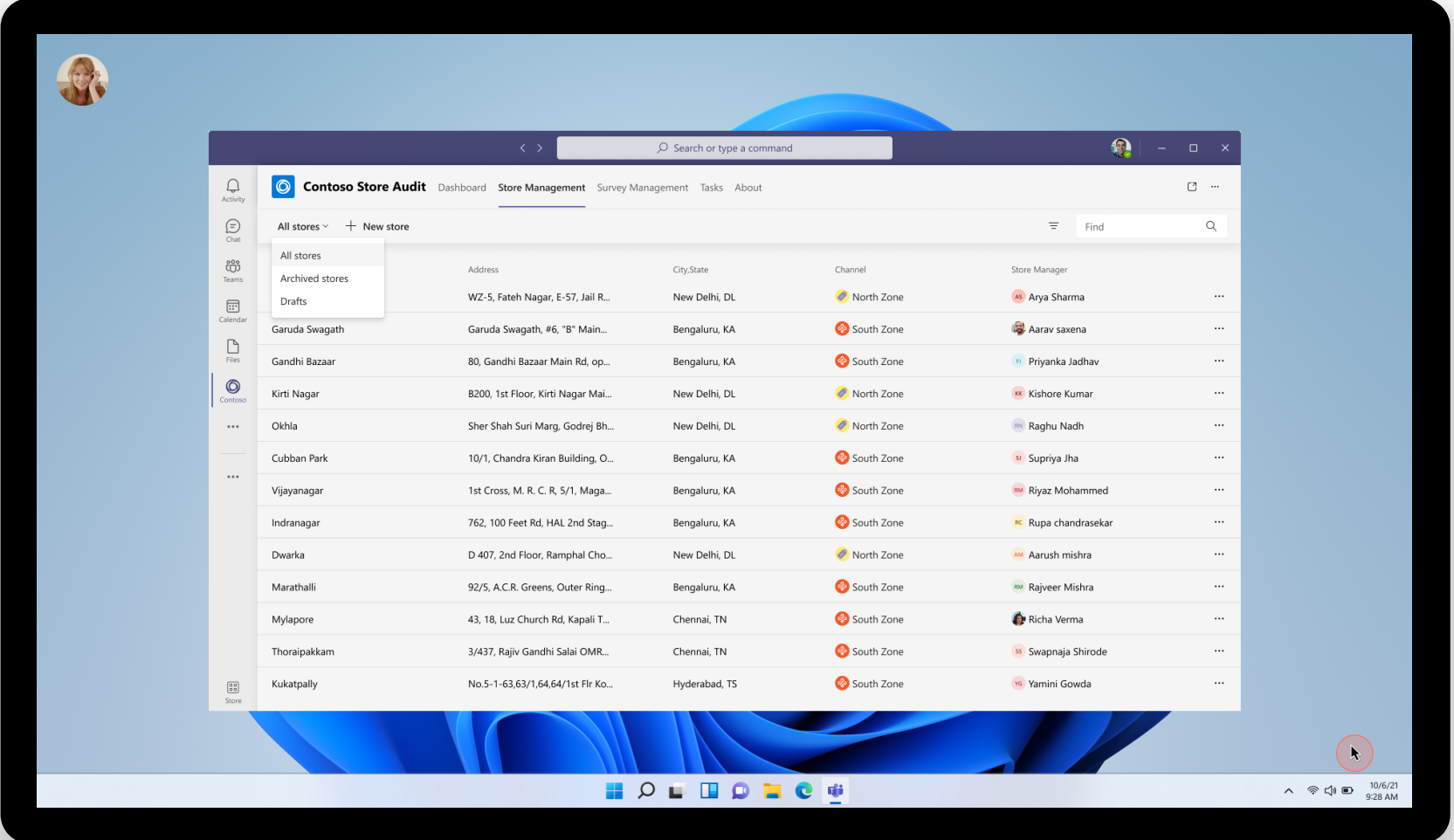
Virtual audits are efficient, accurate, and productive.

- ✓ To determine which store to audit next, Ambika opens a personal app in Teams that she uses to manage all her stores.
- ✓ Right in the app, Ambika can see which location is due for an audit, preview store details, review historical performance, and invite the store manager to a Teams meeting to complete the audit.
- ✓ Ambika and Aarav both receive an automated calendar reminder to join the audit. During the meeting, Ambika can deploy and run an audit survey, add collaborators to answer questions, and assign Aarav a few follow-up tasks.
- ✓ Aarav is automatically notified when a new task is assigned. In a single view, he can see all store tasks, mark progress, and even add a photo as proof of execution.
- ✓ Back on the retail floor, Ambika and Aarav can stay connected easily using the Teams mobile app.

Retail – conduct a virtual store audit

Track and manage all store locations in a single view

- Manage the audit process
- View all stores in one place
- Add new stores or edit existing ones directly in the tool



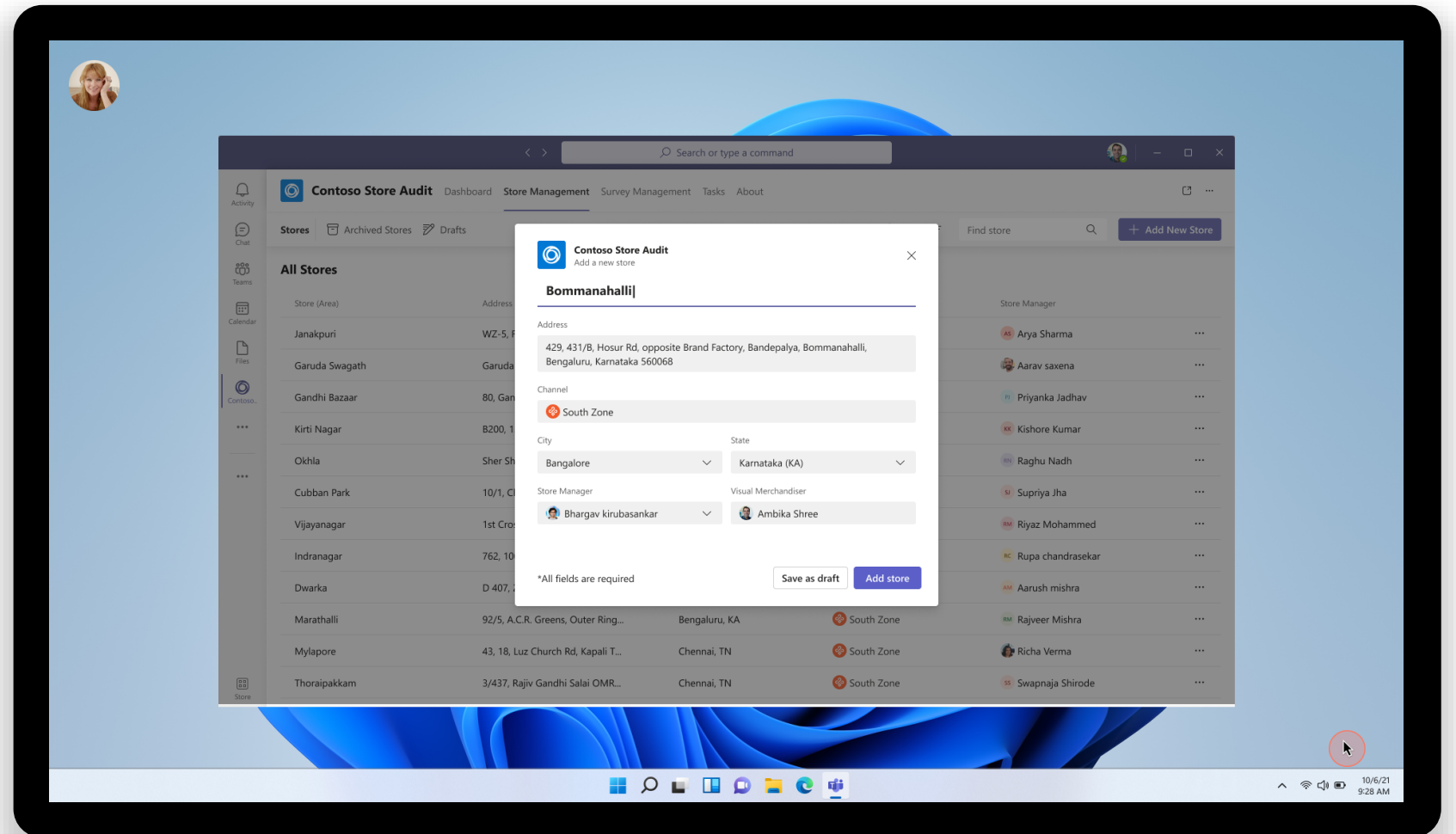
The screenshot displays the 'Contoso Store Audit' application interface. The main view is a table listing store locations. The table has columns for 'Address', 'City, State', 'Channel', and 'Store Manager'. A dropdown menu is open over the 'All stores' header, showing options for 'All stores', 'Archived stores', and 'Drafts'. The table lists 15 stores, including Garuda Swagath, Gandhi Bazaar, Kirti Nagar, Okhla, Cubban Park, Vijayanagar, Indranagar, Dwarka, Marathalli, Mylapore, Thoraiakkam, and Kukatpally. The interface includes a search bar at the top right and a sidebar on the left with navigation options like Activity, Chat, Teams, Calendar, Files, and Contoso. The Windows taskbar is visible at the bottom, showing the date and time as 10/6/21, 9:28 AM.

Address	City, State	Channel	Store Manager
WZ-5, Fateh Nagar, E-57, Jail R...	New Delhi, DL	North Zone	Arya Sharma
Garuda Swagath, #6, "B" Main...	Bengaluru, KA	South Zone	Aarav saxena
80, Gandhi Bazaar Main Rd, op...	Bengaluru, KA	South Zone	Priyanka Jadhav
B200, 1st Floor, Kirti Nagar Mai...	New Delhi, DL	North Zone	Kishore Kumar
Sher Shah Suri Marg, Godrej Bh...	New Delhi, DL	North Zone	Raghu Nadh
10/1, Chandra Kiran Building, O...	Bengaluru, KA	South Zone	Supriya Jha
1st Cross, M. R. C. R, S/1, Maga...	Bengaluru, KA	South Zone	Riyaz Mohammed
762, 100 Feet Rd, HAL 2nd Stag...	Bengaluru, KA	South Zone	Rupa chandrasekar
D 407, 2nd Floor, Ramphal Cho...	New Delhi, DL	North Zone	Aarush mishra
92/5, A.C.R. Greens, Outer Ring...	Bengaluru, KA	South Zone	Rajveer Mishra
43, 18, Luz Church Rd, Kapali T...	Chennai, TN	South Zone	Richa Verma
3/437, Rajiv Gandhi Salai OMR...	Chennai, TN	South Zone	Swapnaja Shirode
No.5-1-63,63/1,64,64/1st Flr Ko...	Hyderabad, TS	South Zone	Yamini Gowda

Retail – conduct a virtual store audit

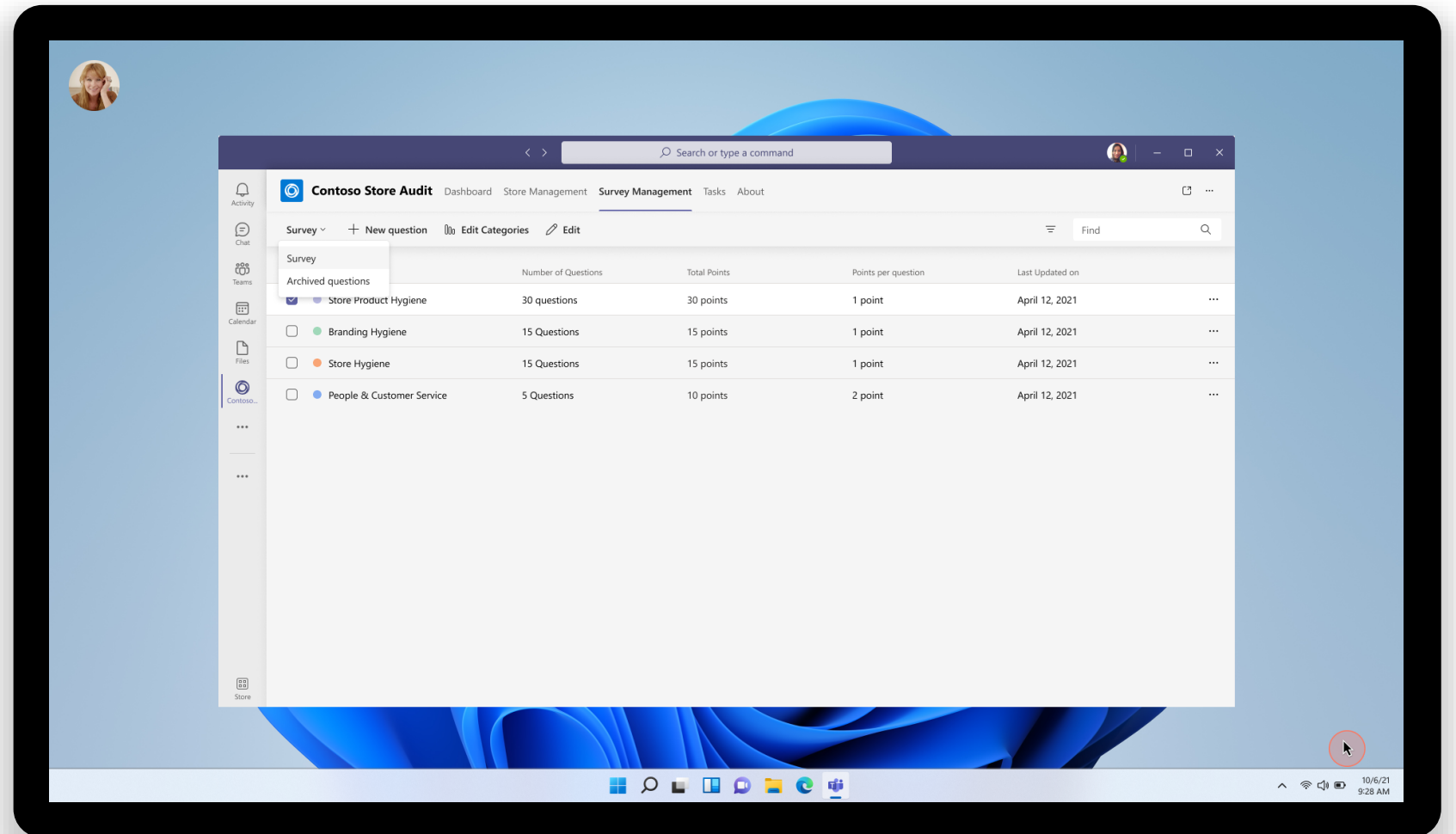
Easily add a new store

- Enter location and store details
- Assign an audit survey



Retail – conduct a virtual store audit

**Tailor audit surveys
to align with audit
objectives**



Retail – conduct a virtual store audit

Power a more productive virtual experience with Teams meeting features

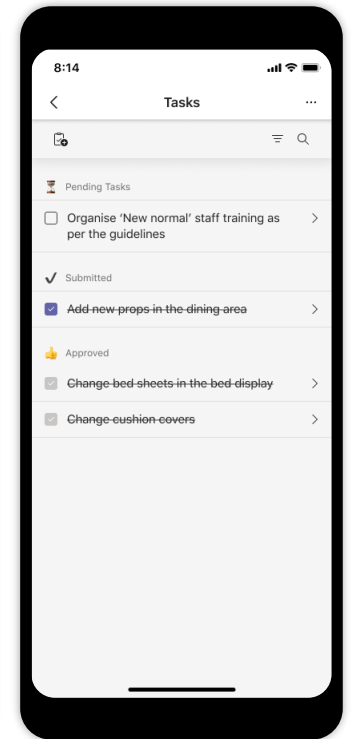
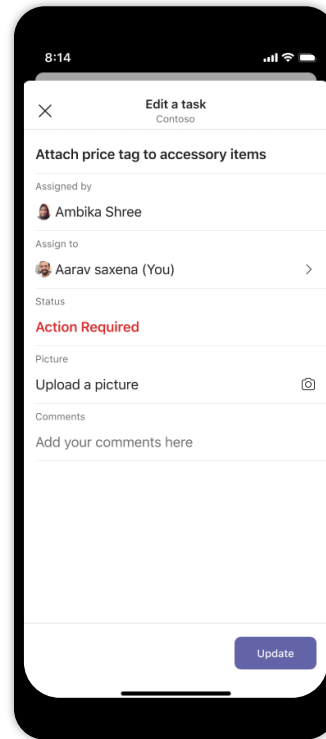
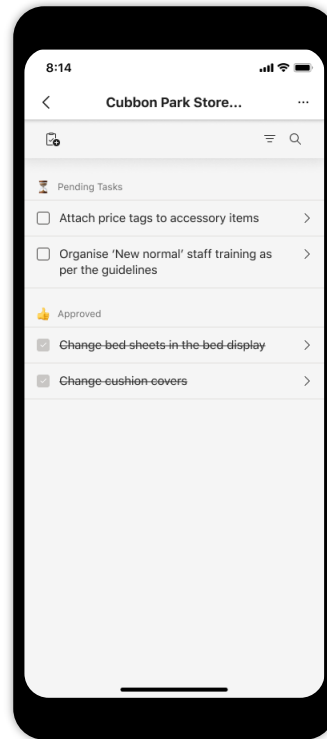
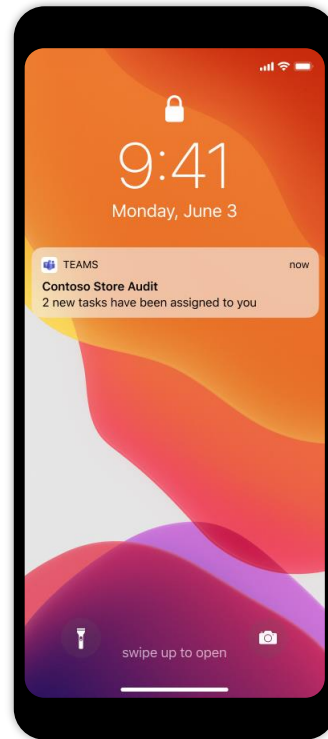
- Add collaborators
- Display audit survey results
- Review audit scores
- Add notes and assign follow-up tasks

The screenshot displays a Microsoft Teams meeting interface. The main video feed shows a virtual store environment with clothing racks. A sidebar on the right is titled "Contoso Store Audit" and is currently on the "Store Product Hygiene" section. The progress bar indicates 7% completion. A "Question 1" is displayed: "Each product has a price tag in respect to new branding. Price tags on any products to be kept on top right facing the walking aisle." The "VM Response" is set to "Yes". The "Remarks" field contains the text "No price tags in accessories display". The "Points" dropdown is set to "0 Point". There are "Add Action" and "Attach price tags to accessory items" options. The meeting controls at the top show a timer at 00:22:06, a "Marketing Review" title, and a "Leave" button. The bottom taskbar shows the Windows logo, search, and various application icons, along with system tray icons and the date/time 10/6/21 9:28 AM.

Retail – conduct a virtual store audit

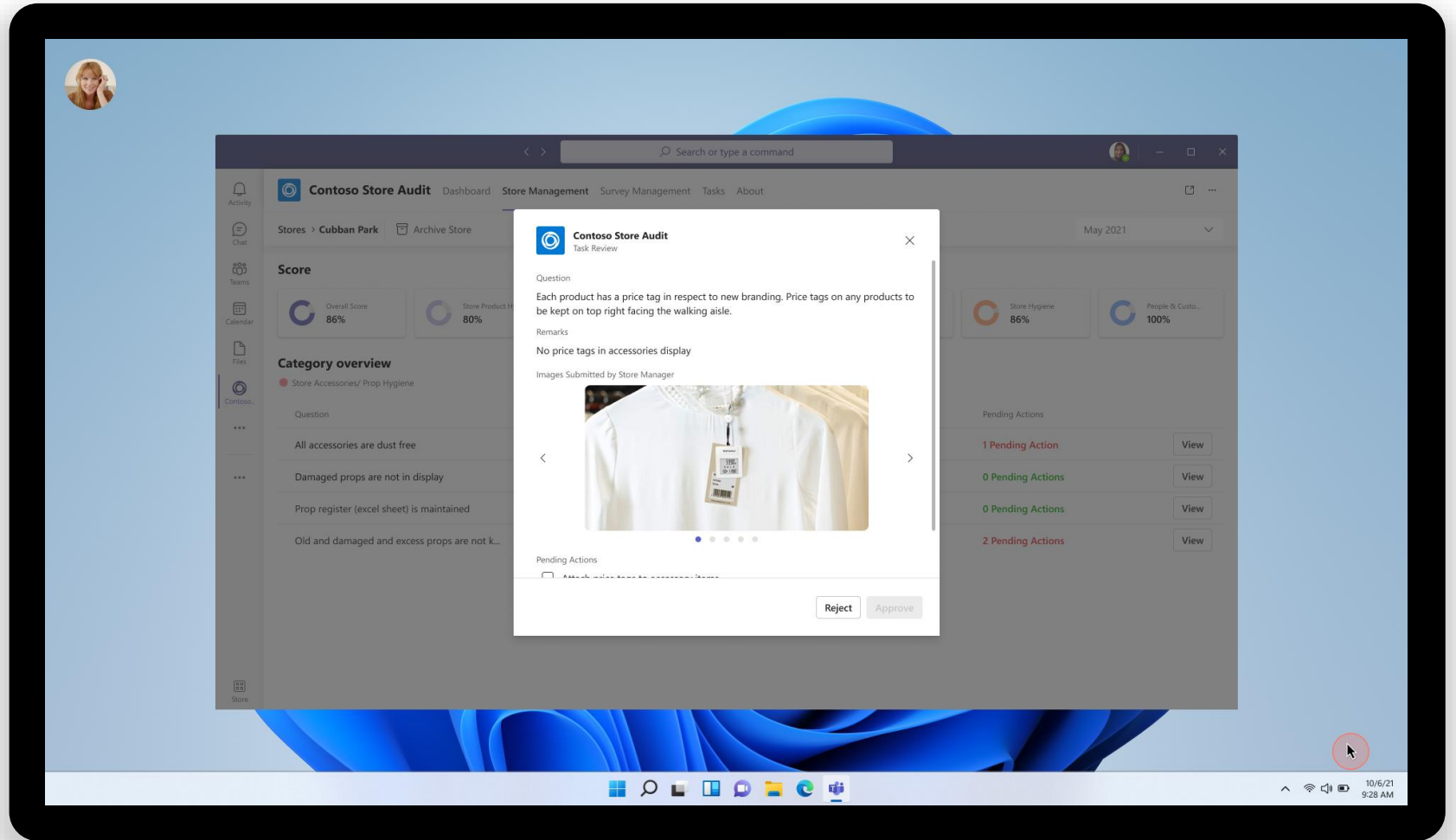
Enable store managers to check off tasks on the go

- Get notified when a new task is assigned
- Update task progress
- Snap a quick photo to confirm completion



Retail – conduct a virtual store audit

Track all tasks across locations and approve completed work



Solution highlights – best practices

Key solution design considerations



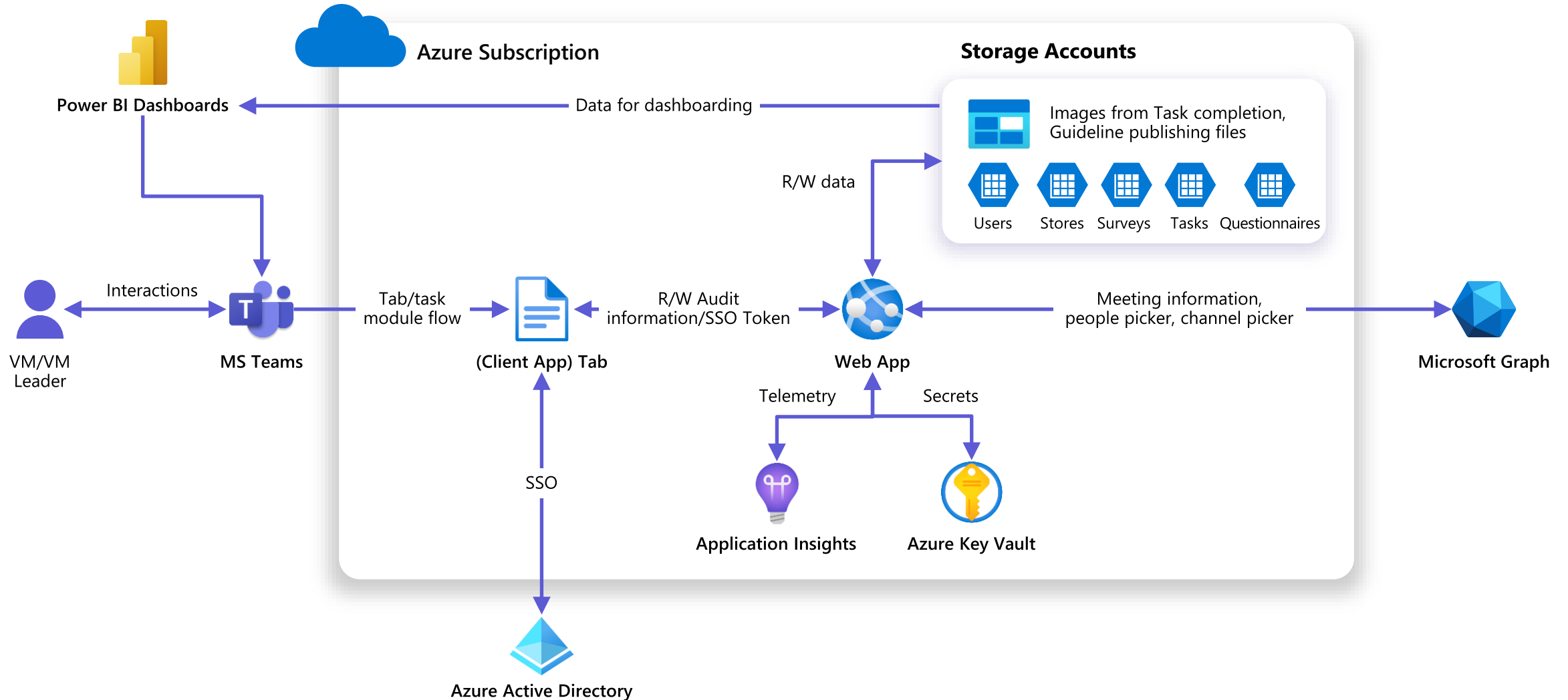
Platform extension points

- [Personal scoped app](#) enables visual merchandisers to manage store locations, surveys and tasks
 - Personal tab is used for store management, survey management, and tasks
 - Personal bot is used to notify store managers about assigned tasks
- [Apps in meetings](#) surface survey questions to the visual merchandiser, and help them get through the questionnaire during the virtual audit process
- [Task modules](#) are used primarily for completing tasks, creating a new store, editing current stores, and completing questionnaires

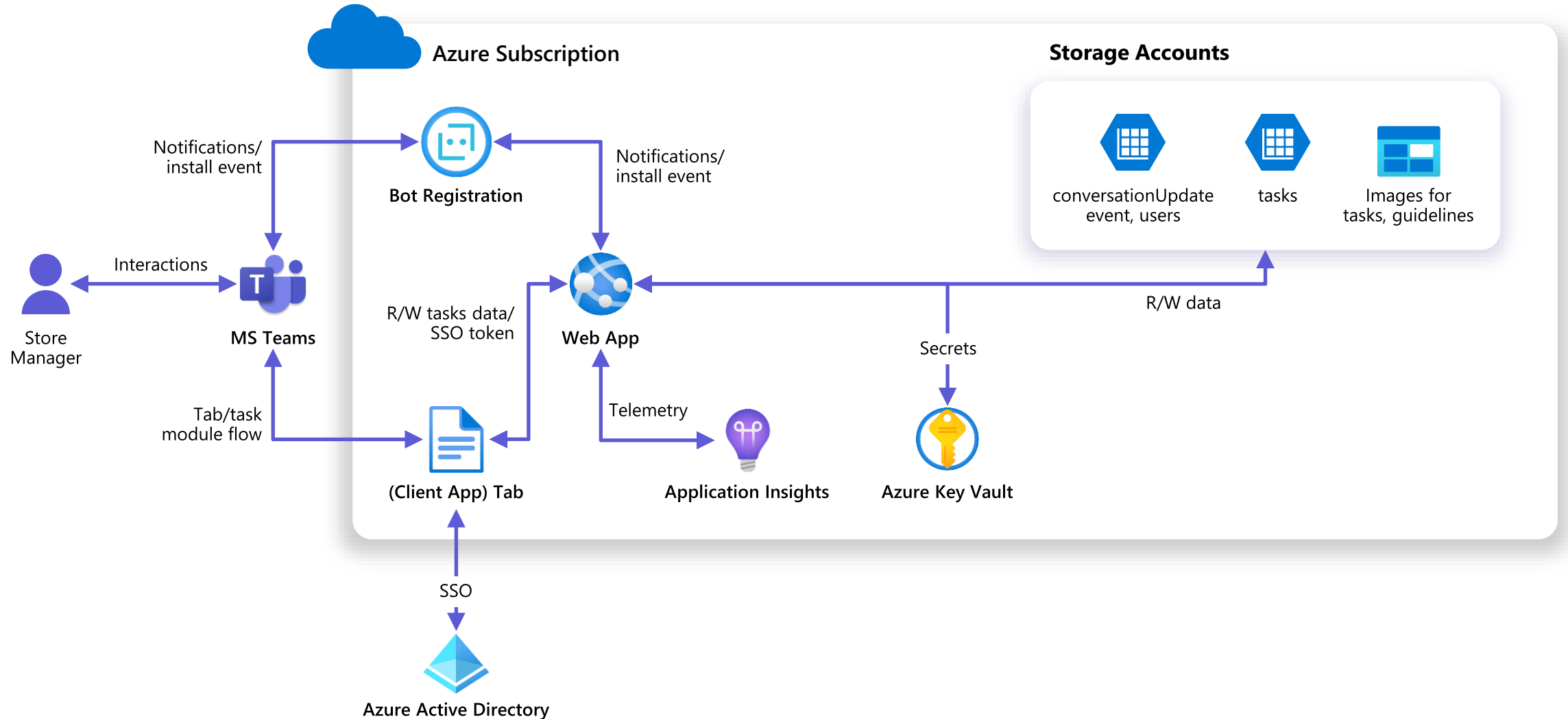
User experience

- [Proactive messages](#) are sent at scheduled times to remind store managers about their pending, assigned tasks from the visual merchandiser

Solution architecture – visual merchandiser



Solution architecture – store manager



Thank you

