On-the-Job Instructions

Prior to the On the Job instructions, the Sales and Service Associate (SSA) should take either the Classroom or eLearning version of Performing Lobby Assistance Course. Contact your District Retail office with questions ~~for training module,~~ if necessary.

When instructing employees how to offer effective lobby assistance, a trainer should show by example in a live lobby environment. The trainer should demonstrate how to effectively approach and query customers while the SSA observes, then shadow them as they perform the duties. Average time spent with each employee will be about an hour but this may depend on customer traffic.

During the On the Job Instruction, the District Trainer (or designee) will train the LSSA, who is responsible for training the SSAs in offices where there is a LSSA:

1. Briefly explain the responsibilities and goals of the Lobby Assistant duties
2. Take the Lobby Assistant through 2-3 SSK transactions to familiarize with the customer screens (if applicable)
3. Show the Lobby Assistant how to replenish consumables and clear alerts (if applicable)
4. During OJT Instructions, trainer should serve as a lobby assistant in the live lobby environment with the trainee observing in order to demonstrate greeting and inquiring techniques
5. Shadow the trainee for several transactions until they are able to effectively triage customers
6. Answer any questions

Lobby Assistants should be able to:

- Confidently approach customers when they arrive in the inner lobby
- Have a pleasant greeting and inquiry method
- Prepare customers for the full service counter
- Utilize slow periods for lobby product replenishment
- Identify SSK–eligible transactions (if applicable)
- Be able to direct customers to the SSK or full service counter (if applicable)
- Be able to clear alerts and replenish consumables